Accuro™EMR 5.0 User Manual

Introduction

Accuro™EMR is software designed for medical clinics. Our mission is to automate the daily tasks within clinics, improve the quality of, and increase access to patient records in a potentially paperless environment. Patient records, scheduling, billing, clinical note taking, prescriptions, electronic medical records, transcription, letter generation, lab results, and reporting are all components of our system.

Accuro™EMR is very flexible and there are often several methods of accomplishing tasks within our program. Feel free to contact our staff to discuss ways of meeting your workflow requirements or to discuss new ways of getting the tasks done.

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Table of Contents

ACCURO LOGIN 20
HOME 22
Mail 22
Sending a new message 22
Viewing Messages 23
Marking a Message as Reviewed 23
Adding a Note to a Message 23
Replying to and Forwarding Messages 23
Deleting and Printing Messages 24
Filing Messages 24
Tasks 25
Creating a new task 25
Viewing and Editing a Task 27
Adding a Note to a Task 27
Completing a Task 27
Deleting a Task 27
Printing a Task 27
Managing Task Descriptions 28
Documents 29
Viewing a Document 30
Reviewing a Document 30
Creating a Follow-up Request 30
Attaching a Document to a Task 31
Transferring a Document 31
Deleting a Document 32
Printing a Document 32
Labs 32
Filtering labs 32
Assigning a Lab to a Provider 32
Viewing Lab History 32
Matching a Patient to a Lab 33
SCHEDULER 34
Appointments 34

Creating an Appointment 34
Editing an Appointment 37
Canceling an appointment 37
Finding an Available Appointment 37
Moving an Appointment 38
Marking a Patient Arrived 38
Marking a Patient No Show 38
Recalling a Patient 38
Double Booking Appointments 39
Appointment Conflict 39
Navigating Dates in the Scheduler 39
Using the Navigation Buttons 39
Using the Mini Calendar 40
Finding Next and Previous Appointments 40
Calendar and Schedule Templates 41
Accessing the Large Calendar 41
Office Calendar 42
Navigating between Months and Years 42
Calendar Notes 42
Creating a Note 42
Removing a Note 43
Scheduled Providers 43
Setting a Scheduled Provider 43
Scheduled Supervisor 43
Setting Scheduled Supervisor 43
Provider Calendar 43
Printing a Provider's Appointment Summary 44
Schedule Templates 44
Template Suggestions 44
Creating a Template Suggestion 44
Editing a Template Suggestion 45
Deleting a Template Suggestion 46
Creating a Template 46
Editing a Template 47

Deleting a Template 47
Applying a Template to the Scheduler 47
Schedule Viewing Modes 48
Single / Multi Day Mode 48
Single / Multi Provider Mode 49
Scheduler Preferences 49
Accessing Scheduler Preferences 49
Types and Reasons 50
Adding an Appointment Type 50
Editing an Appointment Type 50
Deleting an Appointment Type 51
Adding an Appointment Reason 51
Editing an Appointment Reason 51
Deleting an Appointment Reason 51
Setting an Appointment Type Default 51
Setting an Appointment Reason Default 52
Priorities and Settings Tab 53
Adding a Priority 53
Removing a Priority 53
Adding a Status 53
Removing a Status 54
Load Settings from a Patient's Previous Appointment 54
Other Settings 54
Cancelation List 54
Accessing the Cancellation List 54
Adding a Patient to the List 55
Modifying a Patient 55
Deleting a Patient 55
Filtering a Patient 56
Printing the Cancellation List 56
Creating an Appointment for a Patient on the List 56
SCHEDULER MENU 57
Create Appointment 57
Cancel Appointment 57

Copy Appointment 57
Cut Appointment 57
Paste Appointment 58
Patient Arrived 58
Retrieve Details 58
Set Note 58
Insurer Info 58
Find Next Appointment 58
Preferences 59
Cancelation List 59
Book on Waitlist 59
Manage Rooms 59
TRAFIC MANAGER 60
Managing Rooms 60
Creating a Room 61
Editing a Room 61
Deleting a Room 61
Organizing Rooms 62
Functions Located at the Top-Right of the Traffic Manager 62
Editing Patient Demographics 62
Printing a Summary of the Traffic Manager 62
Changing the Scheduler View 62
Selecting a Different Clinic 62
Filtering Provider Patients in the Waiting Room 63
Changing the Date 63
Rearranging Room Layout 63
Resizing a Room 65
Functions Located at the Bottom of the Traffic Manager 65
Selecting Rooms to Show 65
Selecting Provider Rooms to Show 66
Showing Completed Visits 66
Syncing with the Scheduler 66
Traffic Manager Workflow 67
Arriving a Patient 67

Editing a Patient 68
Deleting a Patient 68
Assigning a Provider to a Room 68
Moving a Patient to a Room 68
Once a Patient is in a Room 68
PATIENTS 70
Main Functions 70
Patient Search Tool 70
Patient title 70
Patient Status 70
Office Provider 71
Patient Relationships 71
Print Patient Summary 72
Patient Merge 72
Patient Demographics 72
Adding a Patient 73
Updating a Patient 73
Deleting a Patient 73
Other 73
Custom Fields 73
Managing Custom Fields 73
Managing Aliases 74
Relationships 74
Setting Relationship Status 75
Setting Next of Kin 75
Managing Relations 75
Notes 75
Adding a note 76
Status History 76
Adding a New Status 76
Removing a Status 77
Managing a Status 77
Private Billing 77
Creating a New Bill 78

Applying a Payment to a Bill 78
Printing a Statement of Transactions 79
Generating an Invoice 79
Printing a Receipt 79
Patient Insurer Accounts 79
Managing Patient Accounts 79
Adding a Credit or Issuing a Refund 80
Insurer Rules 81
Adding an Insurer Rule 81
Deleting an Insurer Rule 81
Providers 82
Care Teams 82
Referrals 82
Clinic Providers Seen 83
Manually Added 83
Filters 83
DOCUMENTS 84
Documents 84
Setting Up the Documents Directory 84
Browsing between Documents 85
Zooming and Rotating Documents 85
Multipage Documents 85
Filing Documents 86
Opening, Printing, and Deleting Documents 88
CLAIMS AND BILLING - ALBERTA 90
Daily Claims 90
Creating a New Bill Without an Appointment 90
Submitting from Daily Claims 90
To validate claims in the Daily Claims tab 90
To submit claims in the Daily Claims tab 91
Unsubmitted Claims 91
Adding a Sub-Procedure to a Claim 91
Submitting from Unsubmitted Claims 91
To validate from Unsubmitted Claims 91

To Submit 92
Not Reconciled 92
Submitting from Not Reconciled 92
To submit claims from Not Reconciled 92
Assessments 92
Picking up Assessments 92
WCB Assessment Matching 93
Matching an Assessment 93
Functions Common to all Tabs 93
Changing the Date 93
Changing the Claim Percentage 94
Changing the Provider 94
Viewing Claim Details 94
Viewing the WCB Form for a Claim 94
Viewing a Claim's History 94
Viewing a Claim's Patient Demographic Data 94
Viewing or Changing a Claim's Referring Provider 95
Applying a Macro to a Claim 95
Copying a Pre-Existing Claim 95
Deleting a Procedure 95
Marking a Claim for Resubmission 95
Debiting a Claim 96
Refunding a claim 96
Resubmitting a WCB Claim for Reassessment 96
Using a Claim Number when Submitting 96
Overriding GST 96
To override GST 96
Setting the Facility for a Claim 96
Marking a Claim as Invoiced 97
Setting a Claim to No Charge, NO SHOW, Adjust-to-Paid, Write-Off 97
Marking a Claim as Motor Vehicle Accident (MVA) 97
Viewing a Claim's Invoice (Private Insurers) 97
Viewing a Claim's Associated Appointment 98
The Billing Menu 98

Billing Menu Items 98
Claim Details 99
Opening the Claim Details Dialogue 99
Filling out Claim Details 100
Filling out WCB Claims 105
CLAIMS AND BILLING - BRITISH COLUMBIA 109
Daily Claims 109
Creating a New Bill Without an Appointment 109
Submitting from Daily Claims 109
Unsubmitted Claims 110
Adding a Sub-Procedure to a Claim 110
Submitting from Unsubmitted Claims 110
All Refusals 111
Submitting from all Refusals 111
Adjusted Remittances 111
Remittances 111
Picking up Remittances 111
Functions Common to all Tabs 112
Changing the Date 112
Changing the Claim Percentage 112
Changing the Provider 113
Viewing Claim Details 113
Viewing the WCB Form for a Claim 113
Viewing a Claim's History 113
Applying a Macro to a Claim 113
Copying a Pre-Existing Claim 113
Deleting a Procedure 114
Marking a claim for Resubmission 114
Debiting a Bill 114
Overriding GST and PST 114
Setting the Location for a Claim 114
Marking a Claim as Invoiced 115
Marking a Claim to No Charge, NO SHOW, Adjust-to-Paid, Write-Off 115
Marking a Claim as Motor Vehicle Accident (MVA) 115

Viewing a Claim's Invoice (Private Insurers) 115
Viewing a Claim's Associated Appointment 116
The Billing Menu 116
Billing Menu Items 116
Claim Details 117
Opening the Claim Details Dialogue 117
Filling out Claim Details 118
Filling out WCB Claims 122
CLAIMS AND BILLING - SASKATCHEWAN 125
Daily Claims 125
Creating a New Bill Without an Appointment 125
Submitting from Daily Claims 125
Unsubmitted Claims 126
Submitting from Unsubmitted Claims 126
Not Reconciled 126
Submitting from Not Reconciled 127
Remittances 127
Picking up Remittances 127
Not on File Matching 127
Matching a Remittance 127
Functions Common to all Tabs 128
Changing the Date 128
Changing the Claim Percentage 128
Changing the Provider 129
Viewing Claim Details 129
Viewing a Claim's History 129
Applying a Macro to a Claim 129
Adding a Sub-Procedure to a Claim 129
Splitting a Bill 129
Copying a Pre-Existing Claim 129
Deleting a Procedure 130
Marking a Claim for Resubmission 130
Overriding GST 130
Setting the Location for a Claim 130

Marking a Claim as Invoiced 131
Setting a Claim to No Charge, NO SHOW, Adjust-to-Paid, Write-Off 131
Viewing a Claim's Associated Appointment 131
The Billing Menu 131
Billing Menu Items 132
Claim Details 133
Opening the Claim Details Dialogue 133
Filling out Claim Details 133
CLAIMS AND BILLING - MANITOBA 138
Daily Claims 138
Creating a New Bill Without an Appointment 138
Submitting From Daily Claims 138
Unsubmitted Claims 138
Adding a Sub-Procedure to a Claim 138
Submitting from Unsubmitted Claims 138
To Validate from Unsubmitted Claims 138
To Submit 139
Not Reconciled 139
Submitting From Not Reconciled 139
To Submit Claims From Not Reconciled 139
Remittances 139
Picking Up Remittances 139
To Pick Up Remittances 139
Functions Common to All Tabs 139
Changing the Date 139
Changing the Claim Percentage 139
Changing the Provider 140
Viewing the Claim Details 140
Viewing a Claim's History 140
Applying a Macro to a Claim 140
Copying a Pre-Existing Claim 140
Deleting a Procedure 140
Marking a Claim for Resubmission 140
Overriding GST and PST 141

Marking a Claim as Invoiced 141
Setting a Claim to No Charge, NO SHOW, Adjust-to-Paid, Write-Off 141
Marking a Claim as a Motor Vehicle Accident (MVA) 141
Viewing a Claim's Associated Appointment 142
The Billing Menu 142
Billing Menu Items 142
CLAIM DETAILS 143
OPENING THE CLAIM DETAILS DIALOGUE 143
FILLING OUT CLAIM DETAILS 143
Filling out WCB Claims 144
CLAIMS AND BILLING - ONTARIO 145
Daily Claims 145
Creating a New Bill Without an Appointment 145
Submitting From Daily Claims 145
Unsubmitted Claims 145
Adding a Sub-Procedure to a Claim 145
Submitting from Unsubmitted Claims 145
NOT RECONCILED 146
Submitting From Not Reconciled 146
To Submit Claims from Not Reconciled 146
Remittances 146
Picking up Remittances 146
Functions Common to All Tabs 146
Changing the Date 146
To Change the Current Date 146
Changing the Claim Percentage 146
Changing the Provider 147
Viewing Claim Details 147
Viewing a Claim's History 147
Applying a Macro to a Claim 147
Copying a Pre-Existing Claim 147
Deleting a Procedure 147
Marking a Claim for Resubmission 147
Overriding GST and PST 148

Marking a Claim as Invoiced 148
Setting a Claim to No Charge, NO SHOW, Adjust-to-Paid, Write-Off 148
Viewing a Claim's Associated Appointment 148
THE BILLING MENU 149
BILLING MENU ITEMS 149
Claim Details 149
Opening the Claim Details Dialogue 149
Filling out Claim Details 150
Filling out WCB Claims 150
EMR 151
Day Sheet 151
Viewing a Bill 151
Adding a Billing Macro 152
Setting a Macro 152
Sending a Message 153
Locking the Chart 153
Adding a Task 153
Approving a Macro 154
Editing an Appointment and Billing Notes 155
Opening a Template 155
Viewing the Chart 155
Printing a Day Sheet from the EMR section 156
Encounter Notes 156
Adding Notes to an Encounter Note 156
Linking a diagnosis to an encounter note 157
Printing or Faxing Encounter Notes 158
Creating a consult or Referral Letter 159
Sending a Message 160
Sending a Task 160
Labs 160
Viewing Lab results summary 161
Viewing Clinical Growth Chart 161
Viewing a Lab Graph 162
Creating a Manual Lab 162

Adding a Manual Lab Result 163
Medical History 164
Managing History of Problems 164
Managing Active Medications 165
Managing External Medications 170
Managing Past Surgical History 170
Managing Allergies 171
Managing the Immunization Schedule 172
Managing Lifestyle 175
Managing Family History 177
Virtual Chart 179
Filtering the Chart 179
Tools 180
Template wizard 180
Editing a Template 181
Creating a Macro 181
Editing a Macro 182
Creating Clickable Words 183
Managing Tags 184
Managing Legacy Templates 185
Form Editor 186
Introduction 186
Definitions 186
Form Management Buttons 186
Form Management 187
Creating a new form 187
Adding Components to a Form 187
Types of Elements and Usage 188
Query Element 188
Combo Box 188
Check Box 188
Radio Button 189
Label 189
Text Box 189

Text Area 189
List Box 189
Image 190
Background Image (Watermark) 190
Copying an Existing Form 190
Creating a Multi-Page Form 190
Form Publisher 191
Downloading a Published Form 191
Publishing Forms 191
Using a Form 191
Using a form in encounter notes 191
Using form functions 191
Drawing 192
To change colors 192
To change the thickness 192
To change the type of marking 192
Pen 192
Highlighter 192
Rectangle 192
Erase (Check box) 192
Flipping Pages 192
Saving a Form 192
Versions 192
Printing a Form 192
Refreshing the fields on a form 192
Posting a Form Online 193
Attaching the form to a Date Of Service 193
Deleting a Form 193
WAITLIST 194
Main Window 194
Filtering the Booking List 194
Creating a New Booking Request 194
Matching Appointments to the Waitlist 197
Showing a Completed Booking 197

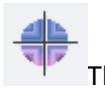
Other Functions 197
Waitlist Configuration 198
Adding a Surgeon to the Waitlist 198
Adding a Completion Information template 199
FILE MENU 200
LABEL 200
PRINTING A LABEL 200
To preview a label 200
To design a custom label 200
Print Form 200
Print VGH Booking Form 200
Print SMH Booking Form 201
Export 201
Import 201
Change Skin 201
Skin Preferences 201
Quit 201
Quitting the Program 201
USER PREFERENCES 202
Defaults 202
Defaults and Settings 202
Display 203
General Tab 203
Alerts 204
Display 205
Date Format 205
Demographics Status Bar 205
Status Bar Font 206
Side Menu Icons 206
EMR Workflow 206
Search 208
Automatic Search Results Popup 208
Choose Fields to Display in Result 209
Labels 209

Individual Label Preferences 210
TOOLS MENU 211
Providers 211
Quick Summary 211
Quick Appointment View 211
Quick Documents View 211
Quick New Patient 211
Family Link 212
Address Book 213
Add/View Patient Tasks 213
Referral Letter 213
Adv. Letter 213
Generate Registration 213
Form Editor 213
Template Wizard 213
Update 213
Framingham Risk Calculator 213
Clinical Growth Charts 214
Mass Transfer 214
Preferred Managements 215
Provider Management 216
Searching for Providers 216
Adding a Provider 216
Updating a Provider 217
Deleting a Provider 217
Provider Wizard 217
Edit Headers 218
Adding a New Letterhead 218
Editing a Letterhead 219
Deleting a Letterhead 219
Adding an Introduction 219
Editing an Existing Introduction 220
Deleting an Introduction 220
Adding a Footer 220

Editing an Existing Footer 221
Deleting a Footer 221
REPORTS 222
Accounts Receivable by Insurer 222
Sorting the A/R Report 222
Opening a Claim History 222
Opening Claim Details 223
Setting a Claim to Write-Off or Adjust-to-Paid 223
Viewing a Bill's Log History 223
Insurer Payments 223
Reporting 223
Requisition Forms 223
ALERTS (QUERY BUILDER) 224
Alert Definitions 224
Creating a Definition 224
Running a Report 226
Alerts and Tasks 227
Completing and Removing Tasks and Flags 228
To complete a task or alert 228
To remove a patient flag 228
Alert Publisher 228
Downloading an Alert 229
ADDRESS BOOK 231
Searching for a Contact 231
Adding a Contact 231
To Add a Contact 231
To Add a Pharmacy 231
To Add a Provider 231
To Add an Insurer 231
THE HELP MENU 232
Help 232
About Accuro 232
Send Feedback 232
Send User Feedback to Optimed 232

Print Manual 233
Submit Log 233
Release Notes 233
Remote Assistance 233
New User Form 233
New Provider Form 233
BACKUP MENU 234
CDS MENU 234
CONFIGURATION MENU 235
Care Teams 235
Adding a Care Team 235
Editing Care Team Members 235
Removing Care Team Members 236
Vaccines 236
Matching a Vaccine with a Lot 236
Immunization Schedule 237
Creating a New Immunization Schedule 237
Patient Immunization Schedule 238
Selecting a Schedule 239
Administering a Vaccine 239
Adding and Administering a Vaccine to a Schedule 240
Condition Diagnosis Maps 241
Adding a Diagnostic Code to a Condition 241

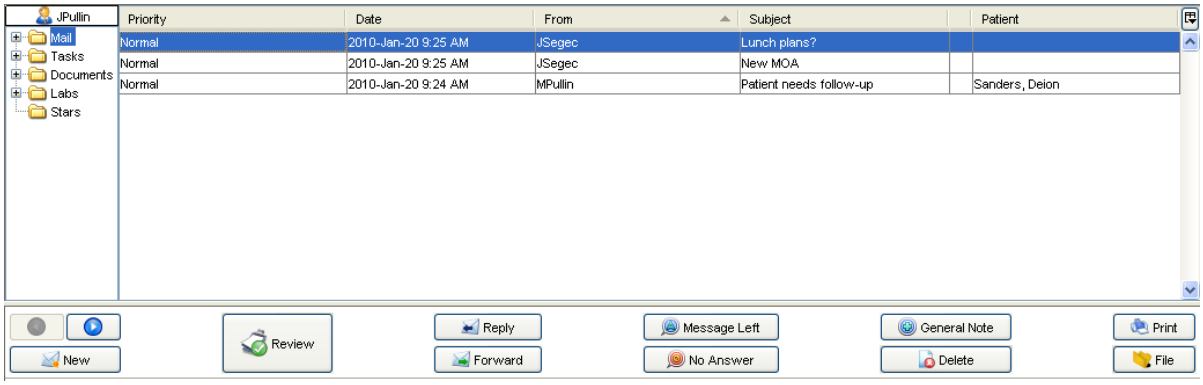
ACCURO LOGIN

To launch Accuro, double-click the Accuro icon on your computer desktop.  This icon can also be found by left-clicking the Start Menu, clicking All Programs and then clicking Accuro

Accuro™ 5.0
Optimed Software Corporation
Username
USERNAME
Password
Login
Clear

HOME

The Home section is used as an internal messaging system. Mail, Tasks, Documents, Labs, and Stars are all created, sent, and reviewed in this section.



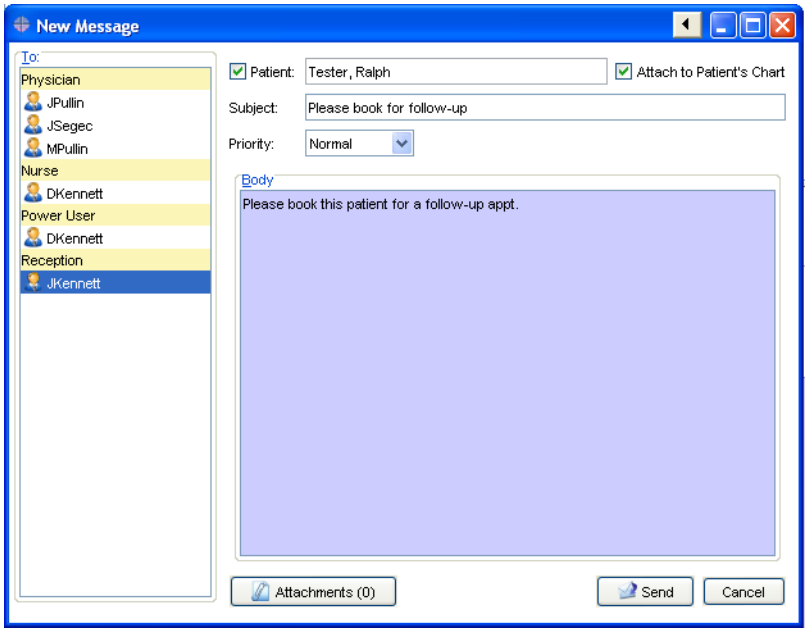
Mail

Mail is used as an internal messaging tool between Accuro users.

Sending a new message

To create and send a new message

1. Click **New**. This will open the **New Message** Dialogue.



2. Select the user(s) to receive the message by clicking on them under the **To:** list. To select more than one user, hold **CTRL** on the keyboard while selecting users.

3. If the note is regarding a patient and the patient is not already loaded, make sure the checkbox beside **Patient:** is checked and load the patient using the **Search Tool**. Select the **Attach to Patient Chart** check box to attach the message to the patient's **Virtual Chart**.

4. Type in a **Subject**.

5. Select a **Priority** from the drop-down list.

6. Type the message in the **Body** text area.

7. To include attachments (if necessary):

    1. Click the **Attachments** button. This will open the **Message Attachments** Dialogue.

    2. Select the desired attachments by clicking the checkbox beside them.

    3. Click **OK**.

8. Click **Send**.

Viewing Messages

To view messages sent to you

1. Select the **Mail** folder or the **Inbox** inside the **Mail** folder.

2. Click on a message to view it in the panel underneath. Double-click a message to open it in its own window.

Marking a Message as Reviewed

To mark a message as reviewed

1. Click on a message to select it.

2. Click the **Review** button. This will move the message from the **Inbox** into the **Reviewed** folder.

Adding a Note to a Message

You can add a note to a message. A note is information about the message which is stamped underneath the message body. The message will be left in the inbox to be looked at later.

To add a note to a message

1. Click on a message to select it.

2. Click on one of the note buttons. Options include **Message Left**, **No Answer**, and **General Note** which can include any text you wish to add.

Replying to and Forwarding Messages

To reply to a message

1. Click on a message to select it.

2. Click the **Reply** button.

3. Enter your reply into the **Body** text area.
4. Click **Send**.

To forward a message

1. Click on a message to select it.
2. Click the **Forward** button.
3. Select the users you wish to forward the message to.
4. Enter any additional text into the **Body** text area.
5. Click **Send**.

Deleting and Printing Messages

To delete a message

1. Click on a message to select it.
2. Click the **Delete** button.

To print a message

1. Click on a message to select it.
2. Click on the **Print** button.

Filing Messages

To move a message to a different folder

1. Click on a message to select it.
2. Click the **File** button. This will open the **File Message** Dialogue.
3. Select a folder from the drop-down list.
4. Click **OK**.

To manage folders under Mail

1. Click on a message to select it.
2. Click the **File** button. This will open the **File Message** Dialogue.
3. Click **Manage Folders**. This will open the **Edit Message Folders** Dialogue.
4. To create a new folder:
    1. Click the **Add** button .
    2. Enter a folder name.

5. To edit a folder:
    1. Click on a folder to select it.
    2. Click the **Edit** button .
    3. Change the folder name as required.
6. To delete a folder:
    1. Click on a folder to select it.
    2. Click the **Remove** button .

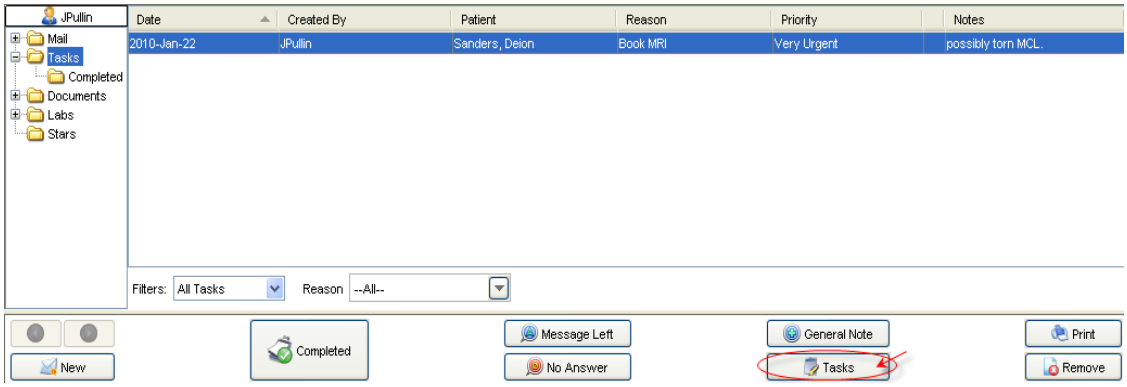
Tasks

In the Tasks folder, you can create a task that needs to be done and that relates to a patient. Some examples of Tasks are Booking an MRI, Requesting a Referral, and calling a client. Tasks are assigned to users.

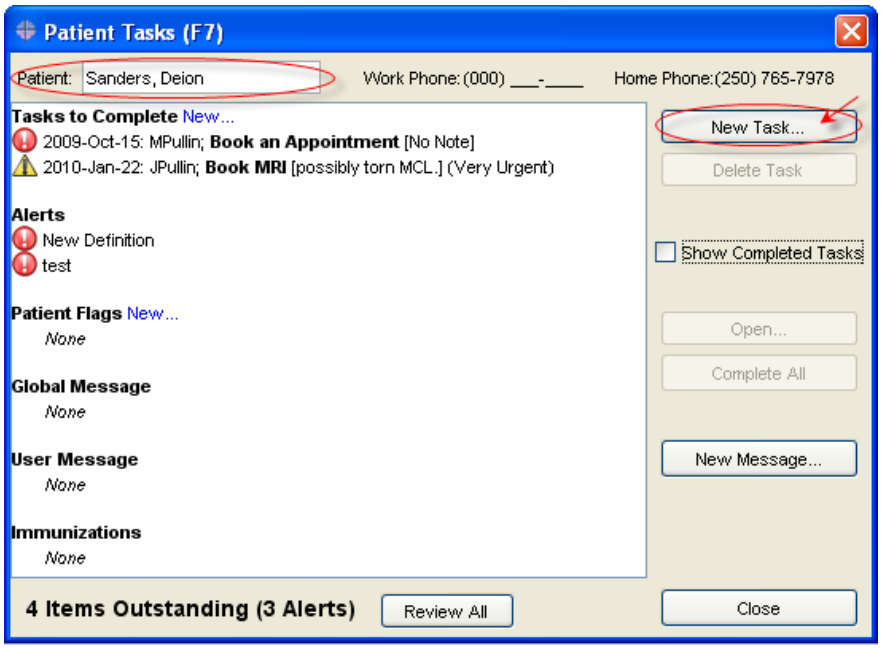
Creating a new task

To create and assign a new task

1. Click the **Tasks** button. This will open the **Patient Tasks** Dialogue (which can also be accessed by pushing **F7** on the keyboard).

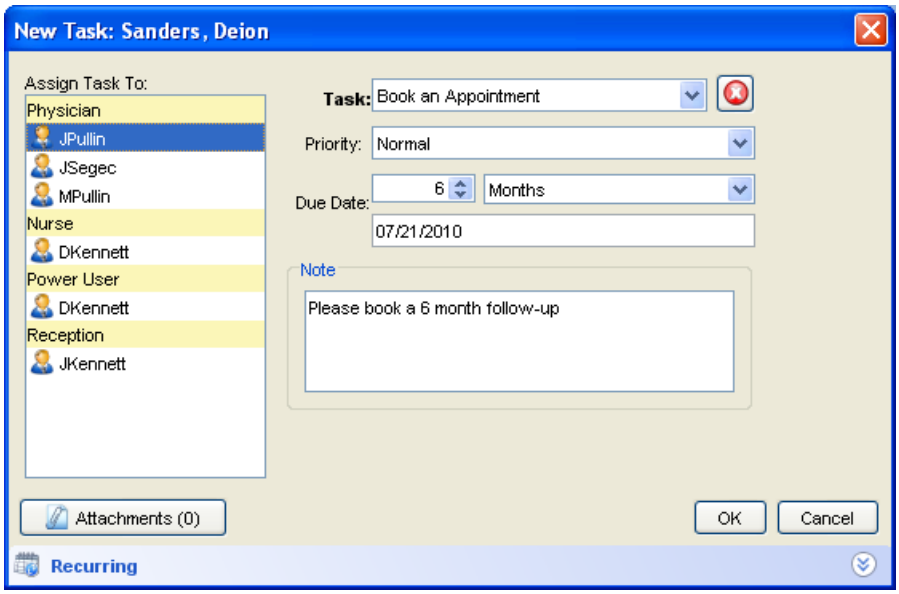


2. The last loaded patient will appear in the patient **Search Tool**. Use the **Search Tool** to change the patient if required.



3. Click **New Task**.

4. Select the user(s) to assign the task to by clicking on them under the **"Assign Task To:"** list. To select more than one user, hold **CTRL** on the keyboard while selecting users.



5. Select a **Task Description** from the drop-down list.

6. Select a **Priority** from the drop-down list.

7. Select a **Due Date**. You can do this one of two ways:

   - Select how many days, weeks, months, or years from the drop-down list

- Click on the date and select a new date from the popup mini calendar.

8. Enter a **Note** into the text box.
9. To include attachments (if necessary):
    1. Click the **Attachments** button. This will open the **Message Attachments** Dialogue.
    2. Select the desired attachments by clicking the checkbox beside them.
10. Click **OK**.

Viewing and Editing a Task

To view or edit a task

1. In the **Tasks** folder, double-click on a task to open it.
2. Make any required changes.
3. Click **OK**.

Adding a Note to a Task

To add a note to a task

1. In the **Tasks** folder, click on a task to select it.
2. Click on one of the note buttons. Options include **Message Left**, **No Answer**, and **General Note** which can include any text you wish to add.

Completing a Task

To complete a task

1. In the **Tasks** folder, click on a task to select it.
2. Click the **Completed** button. This will move the task to the **Completed** folder.

Deleting a Task

To delete a task

1. In the **Tasks** folder, click on a task to select it.
2. Click the **Remove** button.

Printing a Task

To print a task

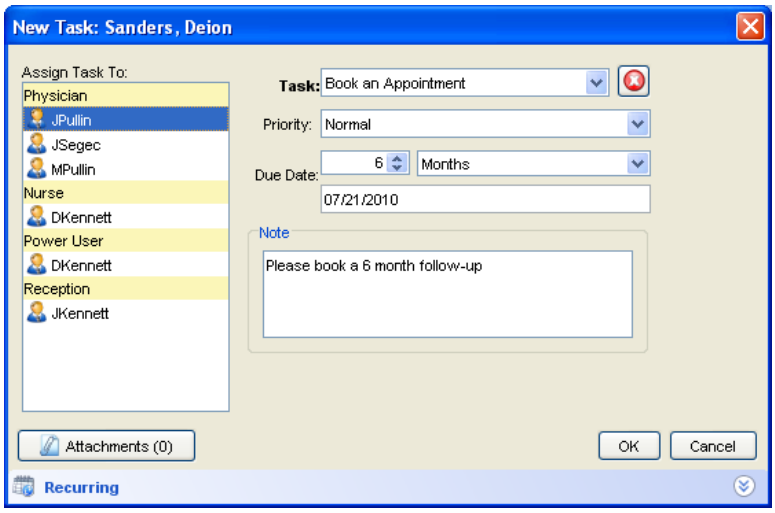
1. In the **Tasks** folder, click on a task to select it.
2. Click the **Print** button.

Managing Task Descriptions

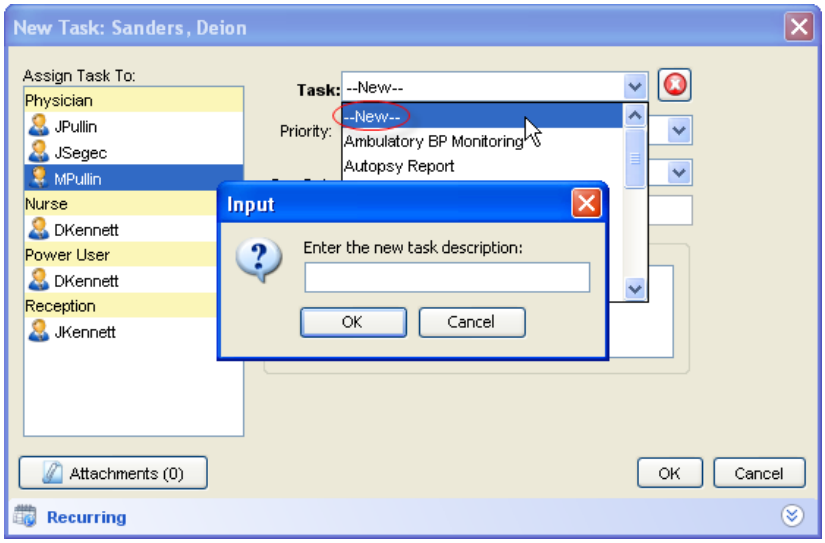
Task Descriptions are managed from the **New Task** Dialogue.

To create a new Task Description

1. Open the **New Task** Dialogue by clicking on **Tasks**, and then **New Task**.



2. Under the **Tasks** drop-down list, select **New**.



3. Enter a new **Task Description** and click **OK.**

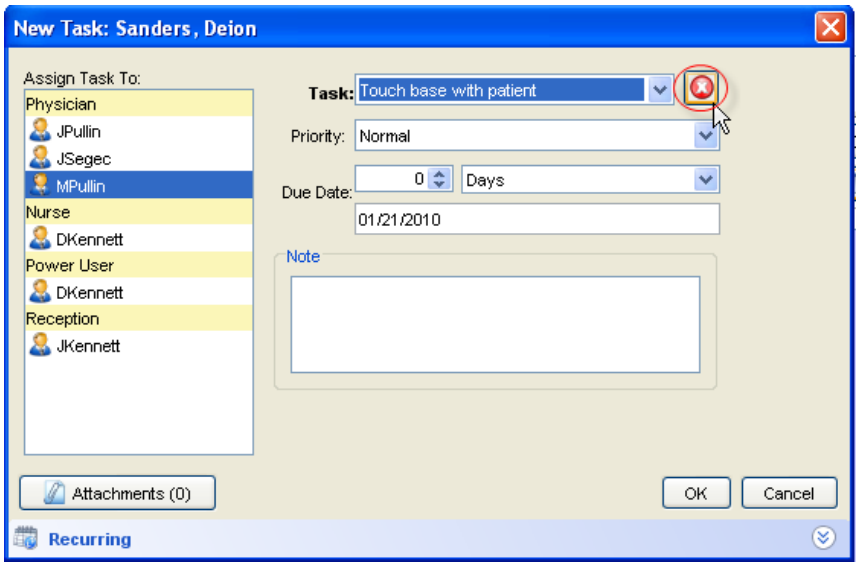
4. Click **OK** to create the task for the selected patient.

To delete a Task Description

1. Open the **New Task** Dialogue by clicking on **Tasks**, and then **New Task**.

2. Select the **Task Type** you wish to delete from the drop-down list.

3. Click the **Remove** button next to the drop-down list.

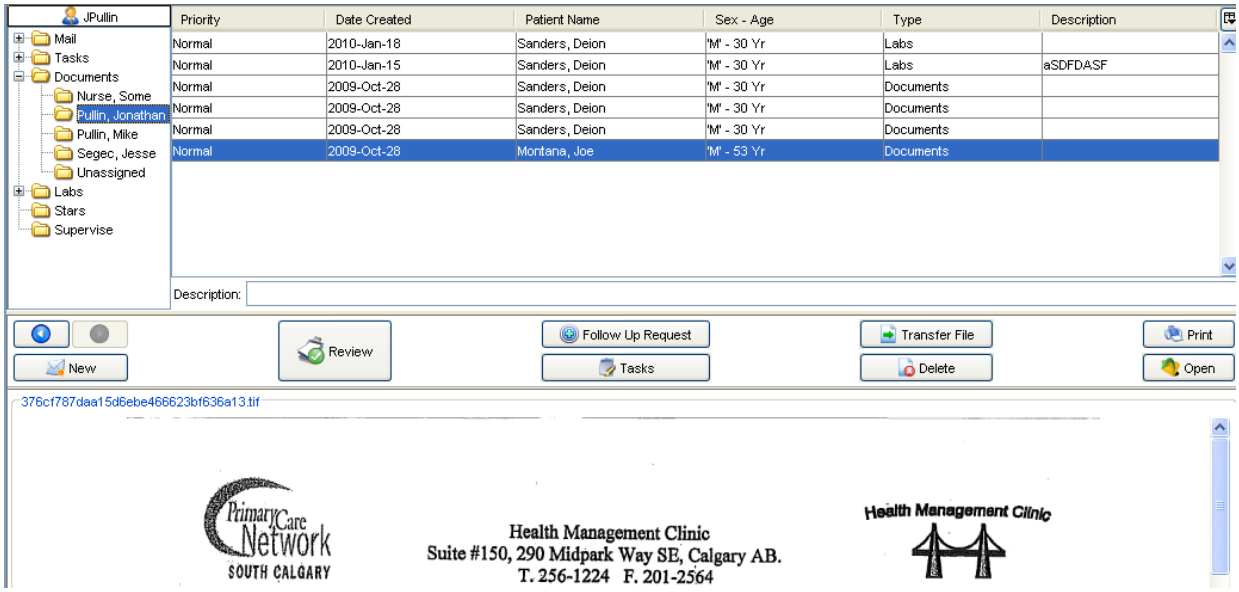


4. Click **OK** to confirm the removal.

Documents

The Documents folder is available for users who are members of the Physician security role. When a Physician member logs into Accuro, all documents that have been sent to a Provider to be reviewed will appear in the corresponding Documents folder.

Once a user is viewing a document in the Documents folder, they have the option to **Review** the document, create a **Follow-up Request**, create a **Task**, **Transfer** the document to a different provider's document folder, or **Delete** the document.



Viewing a Document

To view a document

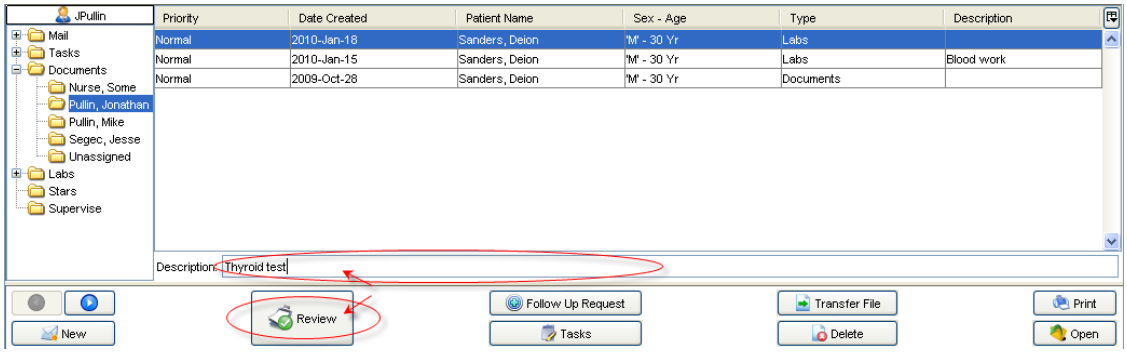
➢ Navigate to a provider's **Documents** folder, and click on a document to view it in the preview panel.

- Alternatively, you can double-click on the document, or select the document and click the **Open** button to open the document in its own window.
- Navigate between documents in a folder by using the arrow buttons .

Reviewing a Document

To review a document

1. Click on a document to select it.
2. Type a **Description** into the textbox just above the **Review** button.



3. Click the **Review** button. This will stamp the document as Reviewed (along with the reviewer's username and date of review)in the patient's **Virtual Chart** and move it out of the **Documents** folder.

Creating a Follow-up Request

A follow-up request is a message asking a user to follow-up on an attached document.

To create a follow-up request with a document attached

1. Click on a document to select it.
2. Click the **Follow-up Request** button.
3. Select the user(s) to send the request to under the **To:** heading.
4. Select a **Priority** from the drop-down list.
5. Type a message in the **Body** text-area.
6. Click **Send**.

Attaching a Document to a Task

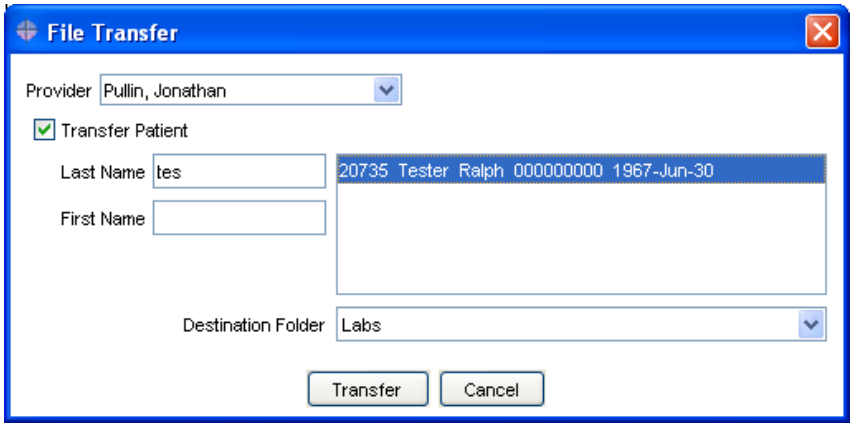
To create a task with a document attached

1. C lick on a document to select it.
2. Click the **Tasks** button.
3. Select the user(s) to assign the task to.
4. Select a **Task Description** from the drop-down list
5. Select a **Priority** from the drop-down list.
6. Select a **Due Date**.
7. Type a **Note** in the text-area if required.
8. Click **OK**.

Transferring a Document

To transfer a document to a different provider or patient

1. Click on a document to select it.
2. Click the **Transfer File** button, or right-click and select **Transfer File**.



3. If you wish to transfer the file to a different provider, select a provider from the drop-down list. Otherwise leave it on the current provider.
   - You can also forward a document by right-clicking on it and selecting **Forward Document**. This is the same as transferring it.
4. If you wish to transfer the file to a different patient's chart, click the **Transfer Patient** checkbox, and use the **Search Tool** to bring up the desired patient. Otherwise uncheck the **Transfer Patient** checkbox.
5. Select the type of document from the drop-down list.

6. Click **Transfer**.

Deleting a Document

To delete a document

1. Click on a document to select it.
2. Click the **Delete** button. This will delete the document from both the patient's chart and from the **Documents** folder.

Printing a Document

To print a document

1. Click on a document to select it.
2. Click the **Print** button.

Labs

Clinics that have the Electronic Labs component installed on their Accuro will have a Labs mailbox under the Home section. Each provider will have their own Labs folder and Lab Documents folder.

Labs results will come into the folder named after each provider. You can see the lab results, as well as the date received, whether or not Accuro was able to match the lab with a patient, the type of test, whether the labs had abnormal results, whether it has been reviewed, and if the patient needs to be contacted.

Filtering labs

You can filter which labs are shown.

To include new labs in the listing

- Click the checkbox beside **New Labs**.

To include patient follow-ups in the listing

- Click the checkbox beside **Patient Follow-ups**.

Assigning a Lab to a Provider

To assign a lab to a provider

1. Click the **Assign Provider** button.
2. Select a provider from the drop-down list.
3. Choose whether to **Forward** or **Assign** the lab to the provider.

Viewing Lab History

To view lab review history

1. Click the **Review History** button.
2. Select a **Review Date** from the popup calendar.

3. Select a provider from the drop-down list.

4. To “un-review” a lab, click the checkbox beside it and click **Unreview Selected**.

Matching a Patient to a Lab

Some labs will come in marked “Unmatched”. This means Accuro doesn’t know which patient the lab is intended for. In this case you will need to locate the patient.

To locate a patient for a lab

1. Click on a lab to select it.

2. Click **Locate Patient**. This will open a patient search Dialogue.

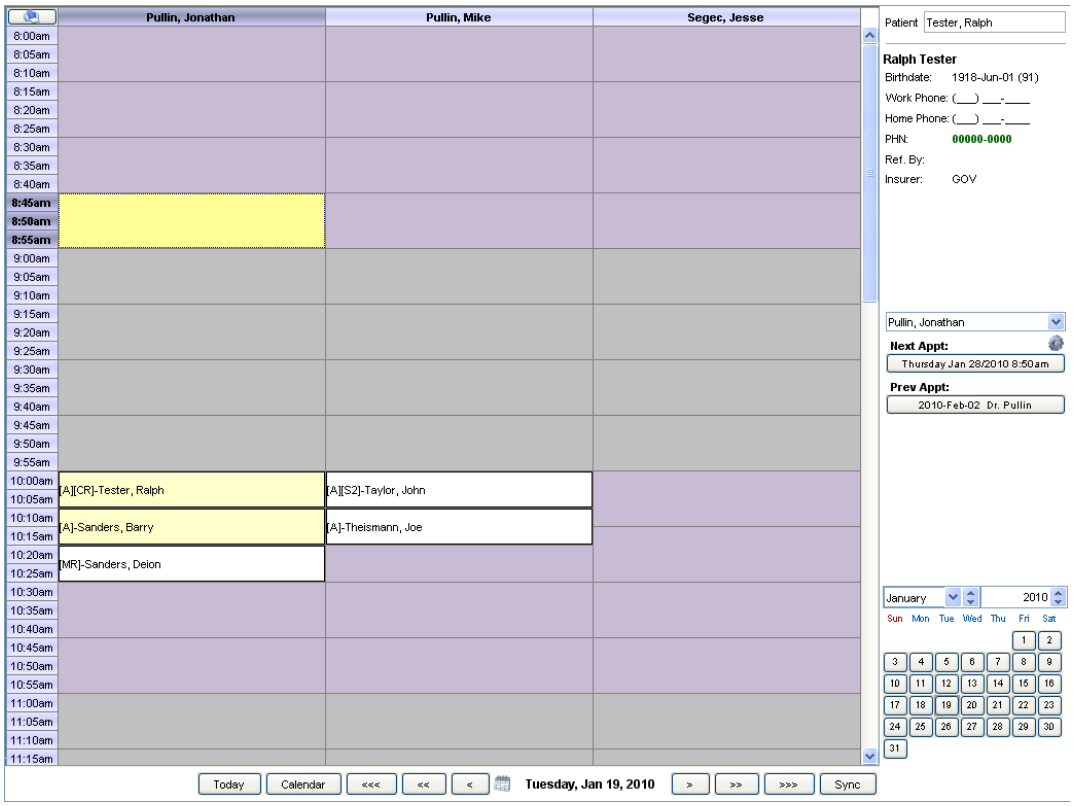
3. Use the **Search Tool** to search for the patient. You can search on name or health number.

    - If the patient is not found in Accuro, you can add the patient by clicking the **Add Patient** button.

4. Once a patient is selected, click **Match** to link the lab to the patient’s chart.

SCHEDULER

Accuro manages patient scheduling with the **Scheduler** section. Appointments can be created and modified here.



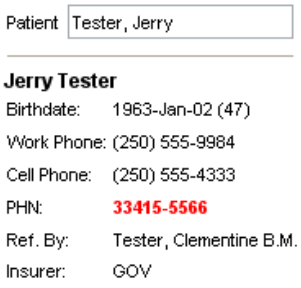
Appointments

This section talks about creating, editing, and moving appointments.

Creating an Appointment

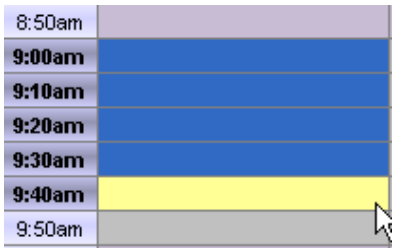
To create a new appointment

1. If a patient has not been loaded, select a patient with the **Search Tool** in the upper-right corner.

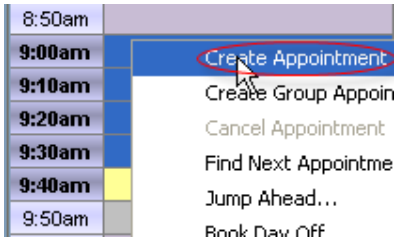


2. On the **Schedule Table**:
    1. Point to the time slot you wish the appointment to begin in.

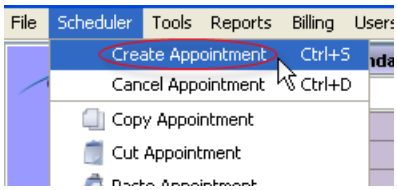
2. Click and drag to the time slot you wish the appointment to end in.



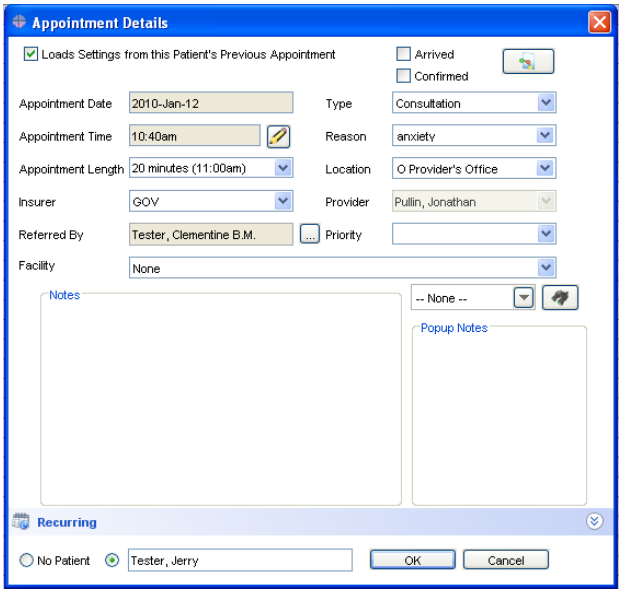
3. Right-click within the highlighted space and select **Create Appointment**.



You can also use **CTRL-S** on the keyboard, or under the **Scheduler menu**, select **Create Appointment.**



4. In **Appointment Details**:



1. Select or change the **Insurer**, **Type**, **Reason**, **Location**, **Priority**, **Facility** from the appropriate drop-down lists if required.

2. Select the **Arrived** or **Confirmed** check box if required.

3. Type any additional notes about the appointment into the **Notes** field or the **Popup Notes** field.

To create a recurring appointment

1. Click **Recurring** towards the bottom left of the Dialogue box.

2. Select the **Frequency** of the recurring appointment using the first two drop-down boxes (ie – Every 3 weeks).

3. Double-click on the **Until** date box. Use the mini calendar to select the appointment's end date.

4. Select the **Provider**(s) you wish to book the appointment with.

5. Click **Simulate**. This will show a list of appointments that will be applied to the scheduler.

6. If you wish to create the appointment, click **Run.**

To create an appointment without a patient

- Select the **No Patient** radio button located at the bottom left of the Dialogue box.

To select a different patient

1. Highlight the **Patient's Name** in the text-box at the bottom of the screen.

2. Type in a different patient name.

3. Type **Enter** on the keyboard. This will bring up a **Patient Search** Dialogue box.

To select a room

1. Select a room from the drop-down menu above **Popup Notes**.

   - The room drop-down list will be empty until you create one using **Manage Rooms** under the **Scheduler Menu**.

2. You can view room schedules by clicking the button directly beside this drop-down with the binoculars icon.

To change the appointment date, time, or length

- The **Appointment Date**, **Time**, and **Length** can be changed using the respective first three fields in the Dialogue

To load the same appointment settings as the patient's previous appointment when creating a new appointment

- Check the box in the top-left corner entitled **Load Settings from this Patient's Previous Appointment**. This setting will be remembered the next time you create an appointment.

Editing an Appointment

To edit an existing appointment

1. On the **Schedule Table**, point to the appointment you want to edit and double-click.
2. Make any necessary changes.

Canceling an appointment

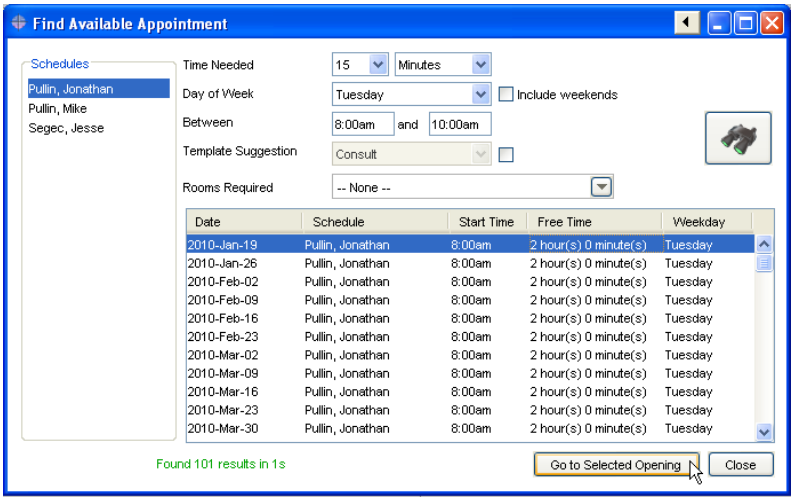
To cancel an appointment

1. On the **Schedule Table**, point to the appointment you want to cancel.R
2. Right-click and select **Cancel Appointment**.
3. In the new window, select **Ok** to confirm or **No** to cancel.
4. In the new window, type the **Reason** for the cancelation.

Finding an Available Appointment

To find an available appointment

1. Right-click on the **Schedule Table**
2. Select **Find Next Appointment**. The **Find Available Appointment** Dialogue will open.



3. Select the **Provider(s)** you are making the appointment for.
4. Select the **Time Needed** from the two drop-down lists. This is the minimum time required for the appointment.
5. Select the **Day of the Week** from the drop-down list if you require the appointment on a specific day. Click the **Include Weekends** checkbox if you wish to include weekends in your search.
6. Select the times **Between** which the appointment must occur.
7. If you are using **Scheduler Templates** you can select a **Template Suggestion** to search on.
8. If you have created rooms, you can select the **Rooms Required.**
9. Click the button with the binoculars icon to run the search.

10. Select a result that meets your requirements.
11. Click **Go to Selected Opening** and the **Scheduler** will now show the selected day.

Moving an Appointment

To move an appointment

1. On the **Schedule Table**, point to the appointment you want to move.
2. Right-click and select **Cut Appointment.**
3. Point to the new time slot you wish to put the appointment.
4. Right-click and select **Paste Appointment.**

Marking a Patient Arrived

To indicate that a patient has arrived

1. Right-click on the appointment.
2. Select **Arrived.** An [A] will appear next to the patient's name on the appointment indicating to other users that the patient has arrived.

Marking a Patient No Show

To indicate that a patient did not show (no show)

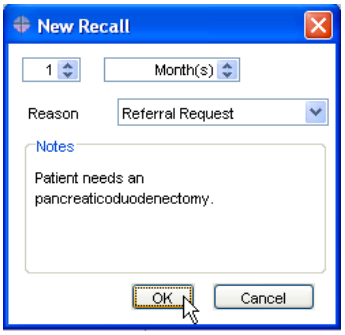
1. Right-click on the appointment.
2. Select **No Show.** An [NS] will appear next to the patient's name on the appointment indicating to other users that the patient was a no show.

Recalling a Patient

This section is commonly used to add a **Call Back** or **Referral Request.**

To add a task to an appointment

1. Select the appointment you wish to create a task for.
2. Right-click and select **Recall Patient.**



3. In the **New Recall** Dialogue box, select a time interval.
4. Select a **Reason.**
5. Click **Save**. A task for this patient will show up in your **Tasks** mailbox in the **Home** section.

Double Booking Appointments

Double booking occurs when more than one patient or event is scheduled for the same time slots. By default, each day and each provider is shown with one booking column.

To add another booking column for a particular day

1. Right-click on the **Schedule Table Header**.
2. Navigate to **Bookings**, and then to **Add Bookings**.

To remove the second booking column

3. Right-click on the **Schedule Table Header.**
4. Navigate to **Bookings**, and then to **Remove Bookings.**

- The second column must be empty in order to remove it.

Appointment Conflict

When you create a new appointment that has the same patient and physician as another appointment on the same day a message will appear.

- Click **Yes** to confirm the new appointment and **No** to cancel the new appointment.

When you create a new appointment, that has the same patient and physician as another appointment scheduled in the future a message will appear.

- Click **Keep** to keep both the future appointment and the new appointment.
- Click **Remove** to remove the future appointment and keep the new appointment.
- Click **Cancel** to cancel the new appointment.

Navigating Dates in the Scheduler

Using the Navigation Buttons

Use the **Navigation Buttons** at the bottom of the screen to navigate between dates.

- The **Today** button will navigate to the current date.

- The **Single-Arrow** buttons will navigate between days.

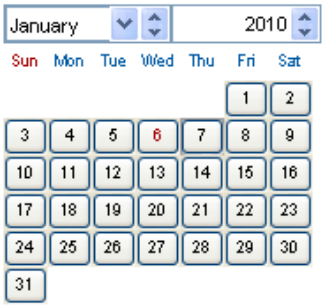
- The **Double-Arrow** buttons will navigate between weeks.

- The **Triple-Arrow** buttons will navigate between months.

Using the Mini Calendar

You can also use the **Mini Calendar** located at the bottom-right of the screen.

- Click on any date in the **Mini Calendar** to navigate to that date in the scheduler.

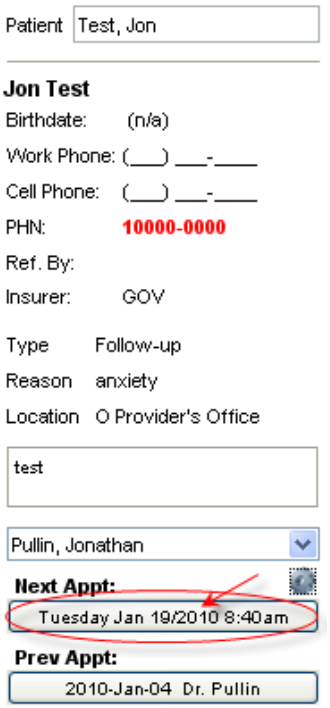


- The **Mini Calendar** can also be accessed by clicking on the **Date** or the **Calendar Icon** located between the navigation buttons.

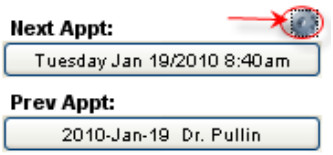
Finding Next and Previous Appointments

To find a patient's next appointment

1. Load a patient in the **Search Tool** in the upper-right corner of the **Scheduler**.
2. Click on the **Next Appointment** button.

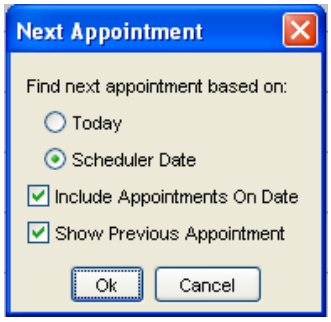


3. You can configure the **Next Appointment** search by clicking on the **Gear Icon** above the **Next Appointment** button.



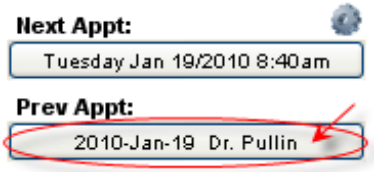
Available options are:

- Find next appointment based on today / scheduler date
- Include appointments on date selected when searching
- Show the **Previous Appointment** search button



To find a patient's previous appointment

1. Load a patient in the **Search Tool** in the upper-right corner of the **Scheduler.**
2. Click the **Previous Appointment** button.



- If the **Previous Appointment** button does not appear, ensure the **Show Previous Appointment** checkbox is selected on the **Next Appointment** configuration Dialogue.

Calendar and Schedule Templates

Once the calendar is open, there are three tabs to choose from: **Office Calendar**, **Provider Calendar**, and **Schedule Templates**.

Accessing the Large Calendar

To open the large calendar

- Click on the **Calendar** button located at the bottom of the Scheduler screen.

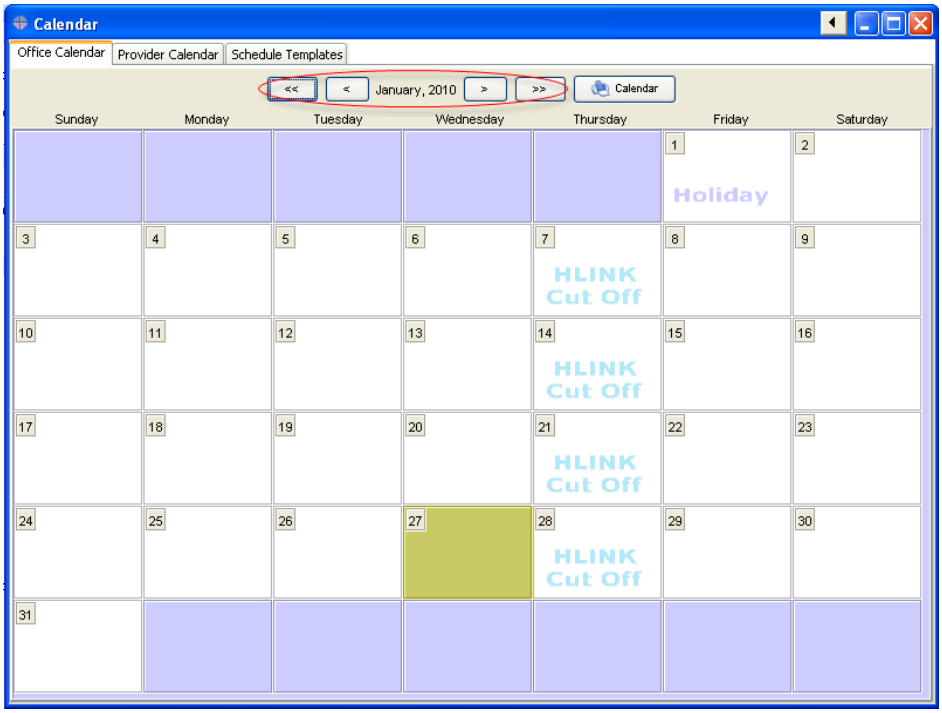
Office Calendar

The **Office Calendar** provides a monthly overview for the clinic. It shows holidays and submission deadlines for your province. It also shows which providers are scheduled for each day and who the **Scheduled Supervisor** is.

Navigating between Months and Years

To navigate between months / years

- To navigate between months and years in the calendar, use the arrow buttons at the top of the screen. The inside buttons move between months, and the outside buttons move between years.



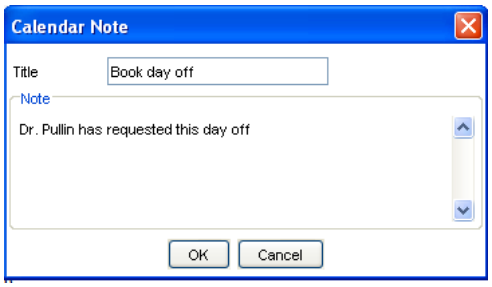
Calendar Notes

You can create **Calendar Notes** which can contain any information related to a particular day.

Creating a Note

To create a note

1. Click on a day to highlight it.
2. Right-click, and select **Set Note.**
3. On the **Calendar Note** Dialogue, enter a **Title** and a **Note.**



Removing a Note

To remove a note

1. Click on a day to highlight it.
2. Right-click, and select **Delete Note.**
3. Confirm the deletion by clicking **Yes.**

Scheduled Providers

If you have **View Scheduled Providers** selected in **Scheduler Preferences**, you can set which providers are scheduled for each day using the **Office Calendar**.

Setting a Scheduled Provider

To set Scheduled Provider(s)

1. Click on a day to highlight it.
2. Right-click, and select **Provider(s) Scheduled**.
3. Select which **Providers** are to be scheduled that day.

Scheduled Supervisor

You can use the **Office Calendar** to set the **Scheduled Supervisor**. The supervisor is the provider that will review any submissions done by a locum.

Setting Scheduled Supervisor

To set Scheduled Supervisor(s)

1. Click on a day to highlight it.
2. Right-click, and select **Scheduled Supervisor**.
3. Select a **Supervisor** from the list of providers**.**

Provider Calendar

The **Provider Calendar** shows a monthly overview for each provider. The clinic can use this to see all appointments booked for the provider on a monthly basis, along with any **Notes** that users have put in the calendar.

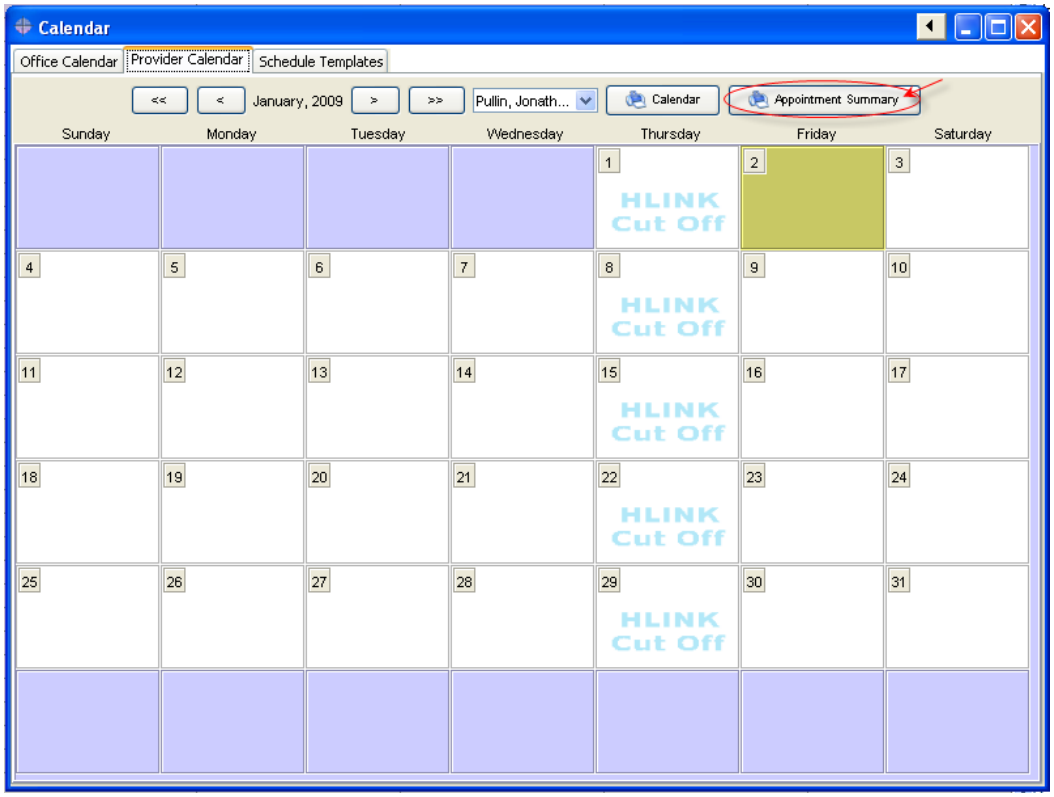
Navigating between months and years, setting and removing **Notes**, and printing the **Provider Calendar** are identical to the **Office Calendar**.

Printing a Provider's Appointment Summary

You can generate and print an **Appointment Summary** for each provider.

To print a Provider's Appointment Summary

- Click on the **Appointment Summary** button, located at the top-right of the screen.



Schedule Templates

Schedule Templates can be applied to the **Scheduler Table** as guidelines for booking appointments. For example, if Dr. Pullin prefers to do surgery on Thursday mornings and have Thursday afternoons open for new consultations, then a template for Thursday would show a background reminding staff of these preferences when booking appointments.

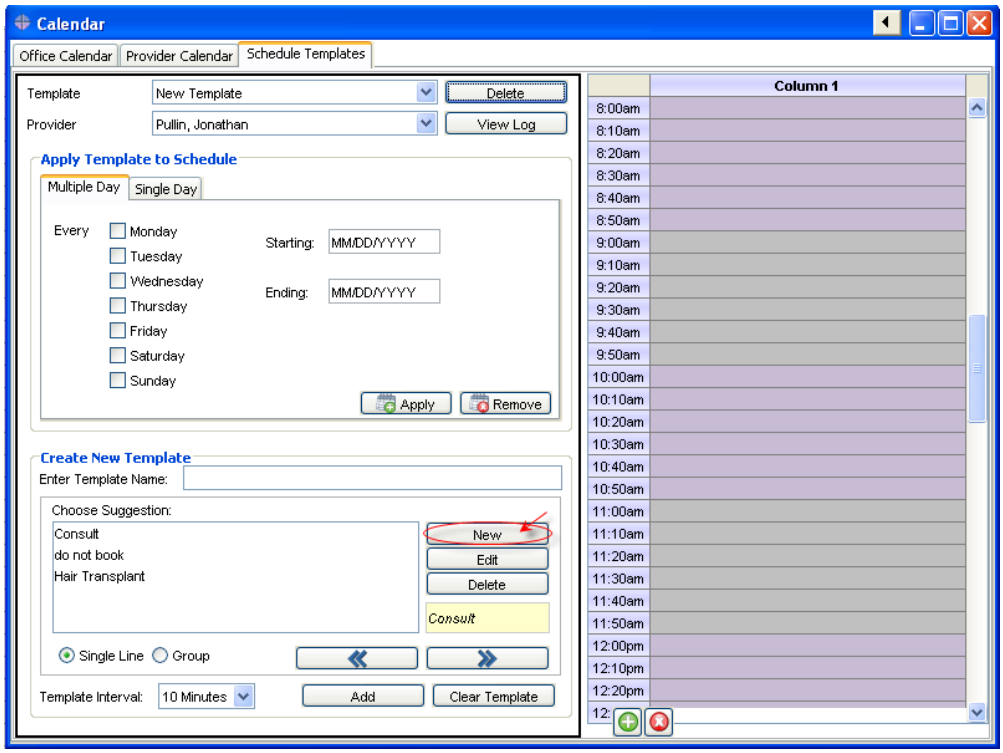
Template Suggestions

The first step to creating a **Schedule Template** is to create a **Template Suggestion**. A template is composed of one or more suggestions. Suggestions are activities that a provider may be involved in during the day such as Lunch, Complete Physical, Consultation, etc.

Creating a Template Suggestion

To create a new suggestion

1. Click **New** in the **Create New Template** section. This will open the **Template Suggestion** Dialogue box.



2. Enter a **Name** for the suggestion.
3. Enter a **Label** that will show up on the **Scheduler Table** for the suggestion.
4. Click on the button to select a background **Color**.
5. Choose if you wish the background color to display as **Solid** or as a **Bar**.
6. Associate the suggestion with an **Appointment Type** from the drop-down box.
7. Associate the suggestion with an **Appointment Reason** from the drop-down box.
8. If you do not wish to allow for appointment creation (for example, at lunch), uncheck **Allow Appointment Creation**. Otherwise keep this option checked.

Editing a Template Suggestion

To edit a suggestion

1. Click on a suggestion to select it.
2. Click **Edit.**
3. Make any required changes.
4. Click **Update.**

Deleting a Template Suggestion

To delete a suggestion

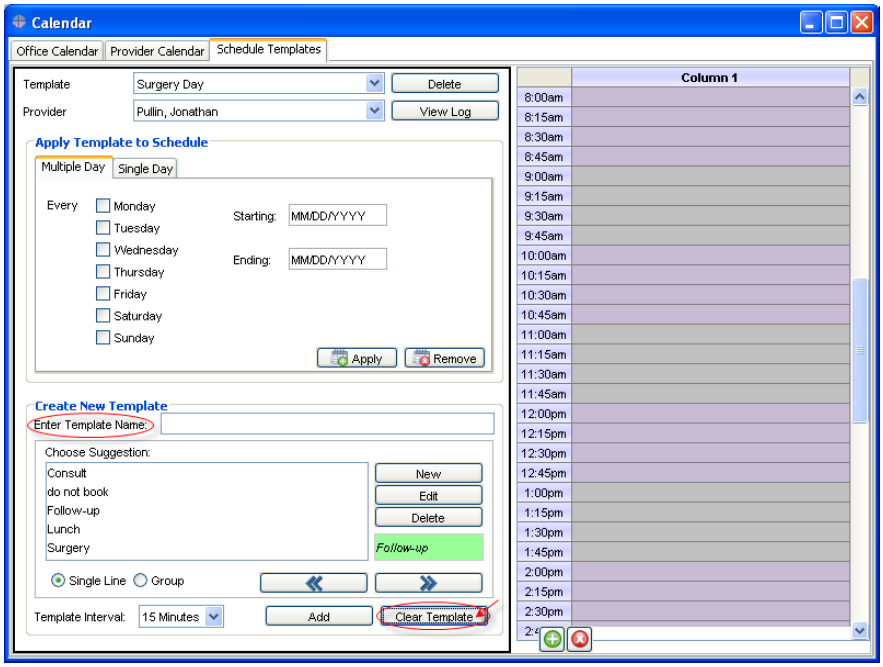
1. Click on a suggestion to select it.
2. Click **Delete.**
3. Confirm the deletion by clicking **Yes.**

Creating a Template

Once you have created one or more suggestions you can use them to create your new template.

To create a new template

1. Click the **Clear Template** button.
2. In the **Enter Template Name** textbox, enter a name for your template.

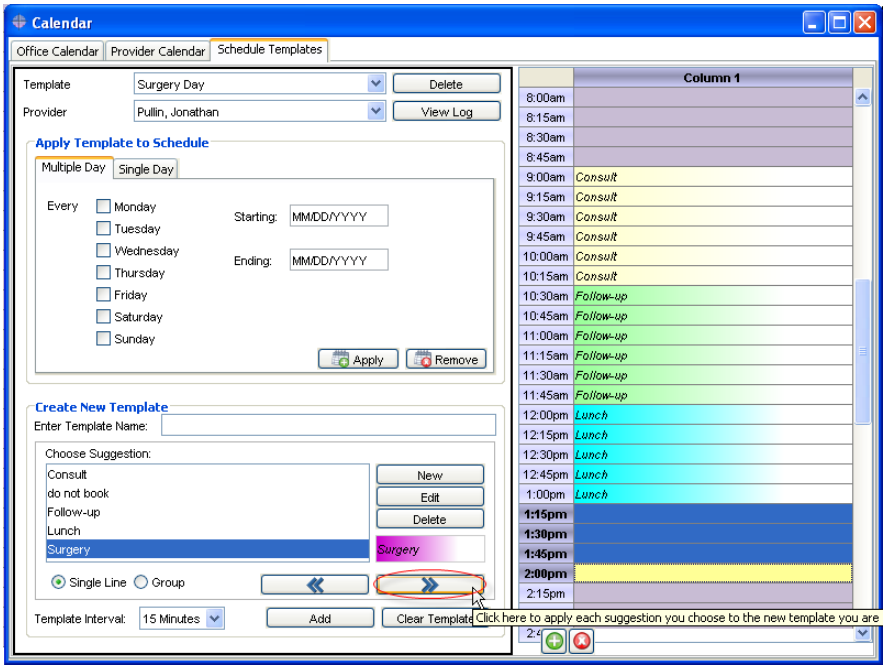


3. Select a suggestion from the list.
4. Select a time period for this suggestion on the **Template Preview** column. You can select one time slot or drag to select a longer period.

    - You can choose what time interval you want the slots on the template to have using the **Template Interval** drop-down box.
    - For multiple time slots, you can choose whether you want the suggestion to appear as a group or as single lines.

- Use the buttons at the bottom of the **Template Preview** to add and remove additional columns to and from the template.

5. Click the double-arrow button to move the suggestion across to the **Template Preview**.



6. Repeat for any other suggestions you wish to include on your template.

7. Click **Add**.

Editing a Template

To edit a template

1. Select a template from the **Template** drop-down box.

2. Use the two double-arrow buttons to add and remove suggestions as required.

3. Click **Update**.

Deleting a Template

To delete a template

1. Select a template from the **Template** drop-down box.

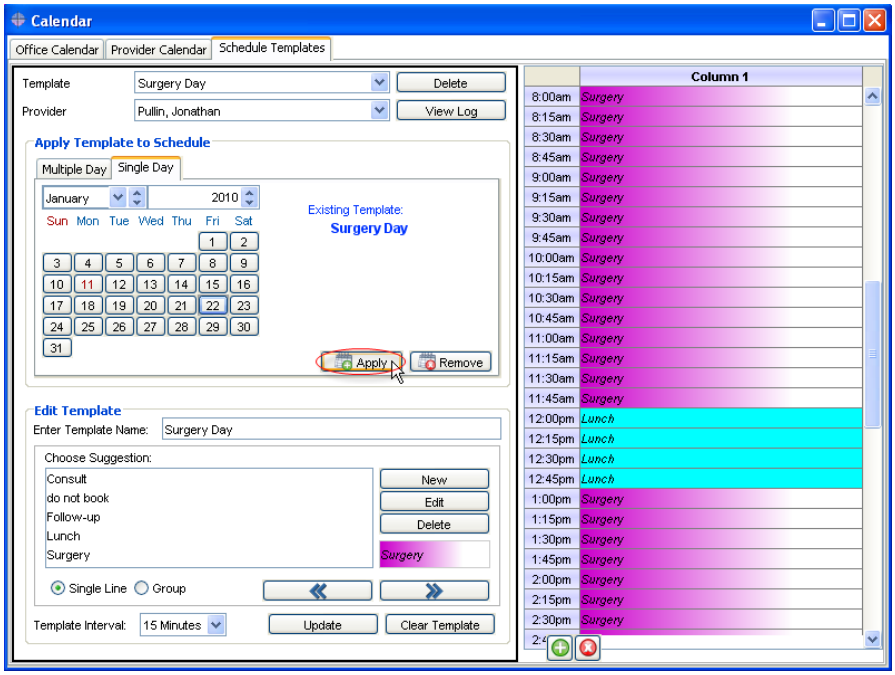
2. Click **Delete**.

Applying a Template to the Scheduler

You can apply a template to a provider's schedule on both a single day, and on multiple days.

To apply a template to a single day on a provider's scheduler

1. elect a template from the **Template** drop-down box.
2. Select a provider from the **Provider** drop-down box.
3. Click on the **Single Day** tab under **Apply Template to Schedule**.
4. Select a day from the **Mini-Calendar**.



5. Click **Apply**.

To apply a template to multiple days on a provider's scheduler

1. Select a template from the **Template** drop-down box.
2. Select a provider from the **Provider** drop-down box.
3. Click on the **Multiple Day** tab under **Apply Template to Schedule**.
4. Choose which days of the week to apply the template to.
5. Select a date range using the **Starting** and **Ending** date boxes.
6. Click **Apply**.

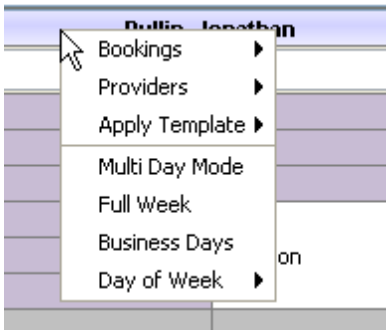
Schedule Viewing Modes

You have the option of showing single or multiple days on the scheduler.

Single / Multi Day Mode

To show multiple days on the scheduler

1. Right-click on the **Schedule Table** header.



2. Select the type of **Multi Day Mode** you wish to show.

    - **Full Week** shows all seven days
    - **Business Days** show Monday through Friday
    - **Multi Day Mode** allows you to select any combination of days

To show a single day on the scheduler

1. Right-click the **Schedule Table** header.
2. Point to **Single Day Mode.**
3. Select the day you wish to show.

Single / Multi Provider Mode

To show multiple providers on the Schedule Table

1. Have the scheduler in **Single Day Mode**.
2. Right-click the **Schedule Table** header.
3. Point to **Providers**.
4. From here you can select **All Providers** or you can select any combination of physicians that you wish to show.

No Matching Days will show if no days are selected in **Single Day Mode**, or if no providers are scheduled when **Show Scheduled Providers** is selected under **Scheduler Preferences**.

Scheduler Preferences

Scheduler preferences are used to set options available for viewing and using the scheduler.

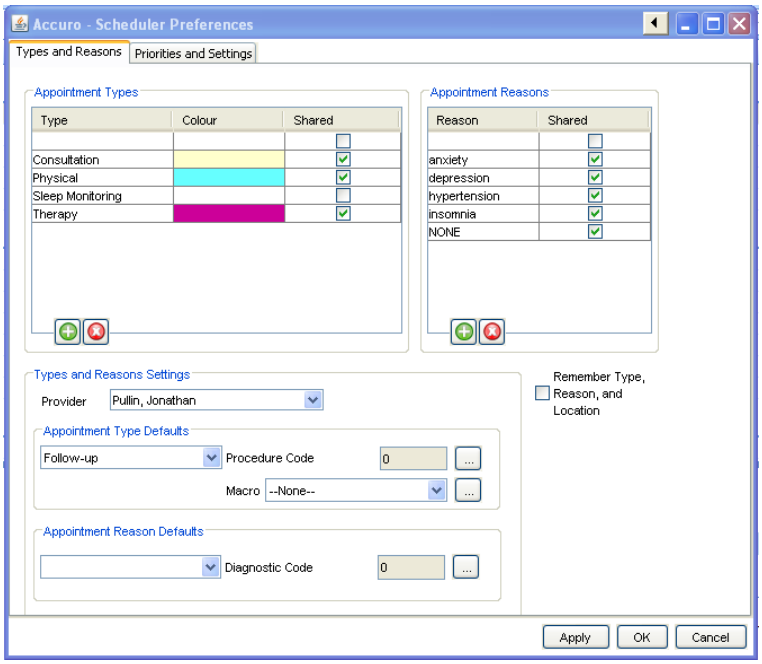
Accessing Scheduler Preferences

To access scheduler preferences

1. Click **Scheduler** from the menu bar.
2. Select **Preferences**.

Types and Reasons

The Type and Reasons tab is used to manage appointment types and appointment reasons, as well as reason and type defaults for each provider.



Appointment Types are used to describe the type of appointment.

Appointment Reasons are used to describe the reason for the appointment.

Under **Types and Reasons Settings** you can set **Appointment Type Defaults** for each provider.

You can also set **Appointment Reason Defaults** for each provider.

Adding an Appointment Type

To add an appointment type

1. Click the **Add** button to create a new line under **Appointment Types**.
2. Click in the line under the **Type** column, and enter a type name.
3. Click in the line under **Colour**, select a colour from the palette, and click **OK**.
4. If you have multiple offices in Accuro, you can share **Appointment Types** across them by clicking the checkbox under the **Shared** column.
5. Click **Apply.**

Editing an Appointment Type

To edit an appointment type

1. You can **Edit** any of the three fields of an **Appointment Type** by clicking on them and making necessary changes.
2. Click **Apply.**

Deleting an Appointment Type

To delete an appointment type

1. Click on a **Type** to highlight it.
2. Click the **Remove** button .

Adding an Appointment Reason

To add an appointment reason

1. Click the **Add** button to create a new line under **Appointment Reasons**.
2. Click in the line under the **Reason** column, and enter a reason name.
3. If you have multiple offices in Accuro, you can share **Appointment Reasons** across them by clicking the checkbox under the **Shared** column.
4. Click **Apply.**

Editing an Appointment Reason

To edit an appointment reason

1. You can **Edit** either of the fields of an **Appointment Reason** by clicking on them and making necessary changes.
2. Click **Apply**.

Deleting an Appointment Reason

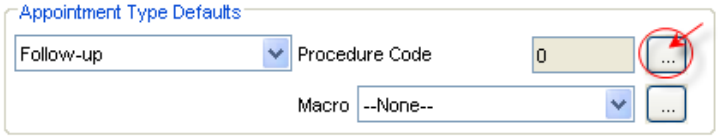
To delete an appointment reason

1. Click on a **Reason** to highlight it.
2. Click the **Remove** button .

Setting an Appointment Type Default

To set an appointment type default

1. Select the **Provider** from the provider pull-down menu.
2. Select an **Appointment Type Default** from the pull-down menu to set as the default.
3. Select a default **Procedure Code** (if required):



4. Click on the **Procedure Code** Dialogue button.
5. Search on either **Code** or **Keyword.**
6. Select the **Code** and click **OK.**
7. Select a default **Macro** from the pull-down box or create a new one (see **Creating a Macro**).
8. Click **Apply**.

Setting an Appointment Reason Default

To set an appointment reason default

1. Select the **Provider** from the provider pull-down menu.
2. Select an **Appointment Reason Default** from the pull-down menu.
3. Select a default **Diagnostic Code** (if required):

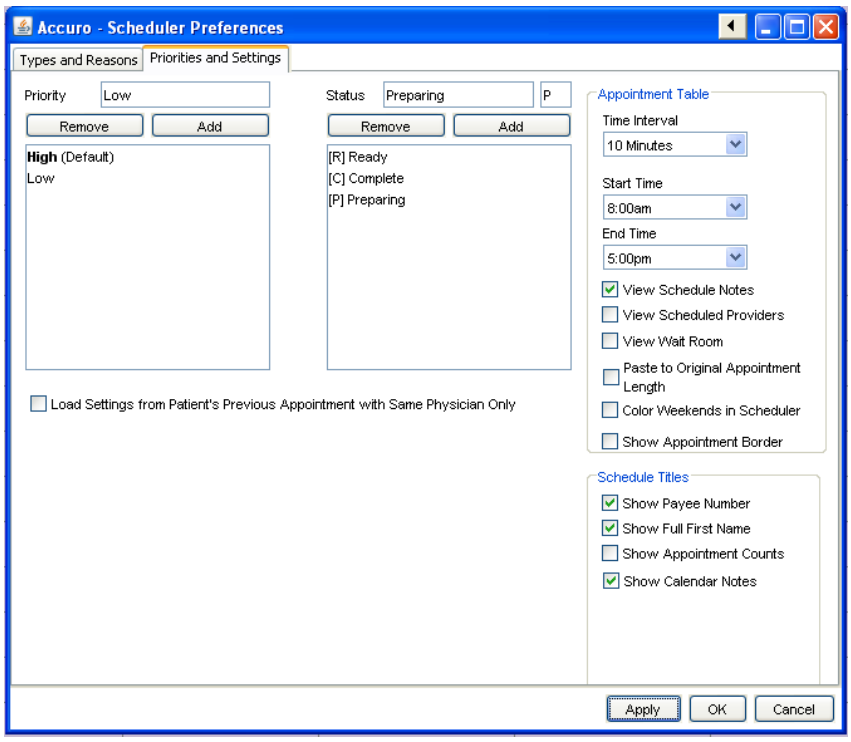
4. Click on the **Diagnostic Code** Dialogue button.
5. Search on either **Code** or **Keyword.**
6. Select the **Code** and click **OK.**
7. Click **Apply.**

You can have the **Scheduler** remember the type, reason, and location from the **Last Appointment Booked** for a provider. This will override the provider's **Default Type** and **Reason**. However, when creating a new appointment, the **Load Settings from this Patient's Previous Appointment** checkbox will override this setting.

To set this:

1. Click the checkbox beside **Remember Type**, **Reason**, **and Location**.
2. Click **Apply**.

Priorities and Settings Tab



Adding a Priority

To add a new priority

1. Type a priority name into the text box beside **Priority**.
2. Click **Add.**
3. Click **Apply.**

Removing a Priority

To remove a priority

1. Click on a priority to highlight it.
2. Click **Remove**.
3. Click **Apply**.

The Priority is set in **Appointment Details** when creating a new appointment.

Adding a Status

To add a new status

1. Type a priority name into the text box beside **Status**.
2. Click **Add**.
3. Click **Apply**.

Removing a Status

To remove a status

1. Click on a status to highlight it.
2. Click **Remove**.
3. Click **Apply**.

The status is set by right-clicking on an **Appointment** in the **Scheduler**, and pointing to **Status.**

Load Settings from a Patient's Previous Appointment

You can **Load Settings from Patient's Previous Appointment with Same Physician Only** by selecting this checkbox and clicking **Apply.**

Other Settings

Set the time interval to display on the scheduler by selecting a value from the drop-down list beneath **Time Interval**

Set the **Start** and **End Times** to display on the scheduler using the drop-down lists

View Schedule Notes: Appointment information and notes will be displayed on the scheduler table

View Scheduled Providers: Only providers with scheduled appointments on a particular day will be shown in the Scheduler. This will remove the Providers option when right-clicking on the Scheduler Head

View Wait Room

Paste to Original Appointment Length: Pasted appointments will be as long as possible up to the length of the original appointment

Color Weekends in Scheduler

How Appointment Border: Appointments in the scheduler table will appear with a black border separating them

Show Payee Number

Show Full First Name: Providers' full first names will be shown on the Scheduler Header. Unchecking this box will show only the first initial

Show Appointment Counts: The number of appointments each provider has on that day will be shown underneath the provider's name on the Scheduler Header

Calendar Notes: A blank space for notes will appear on the scheduler header for each day

Cancelation List

The **Cancellation List** is used to record patients which request appointments in the case of a cancelled appointment.

Accessing the Cancellation List

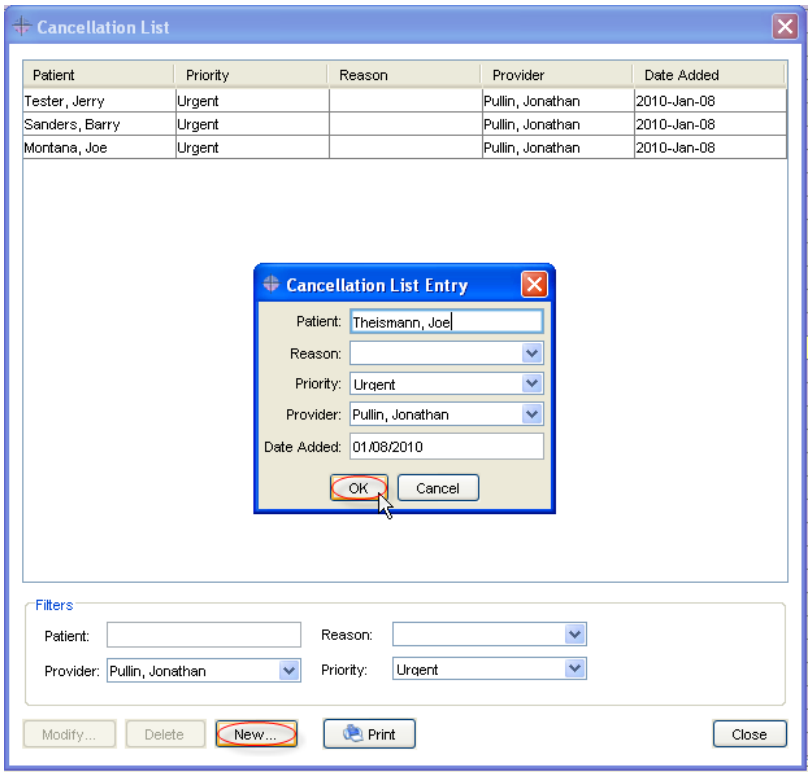
To open the cancellation list

1. Under the **Scheduler Menu**, select **Cancellation List.**

Adding a Patient to the List

To add a patient to the list

1. Click **New** located at the bottom-left of the **Cancellation List** Dialogue box.
2. Select a **Reason** from the drop-down list.
3. Select a **Priority** from the drop-down list.



Modifying a Patient

To modify a patient

1. Select a patient from the list.
2. Click **Modify**.
3. Make any required changes.

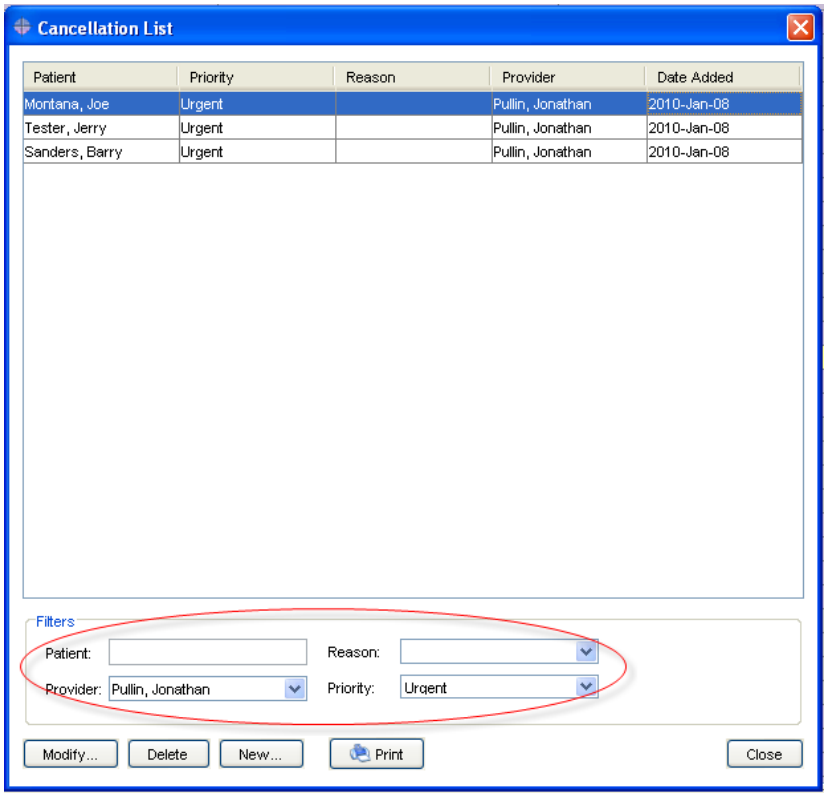
Deleting a Patient

To delete a patient

1. Select a patient from the list
2. Click **Delete**

Filtering a Patient

You can **Filter** patients on the list by **Patient** name, **Provider**, **Reason**, and **Priority.**



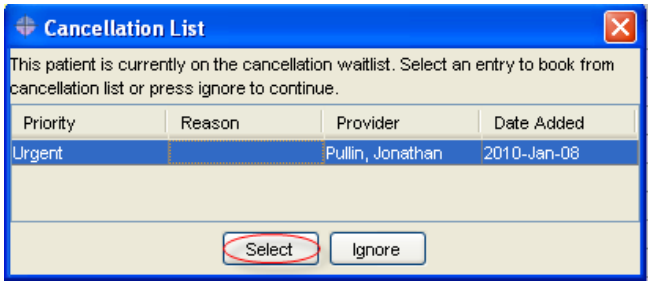
Printing the Cancellation List

To print the cancellation list

1. Click the **Print** button.

Creating an Appointment for a Patient on the List

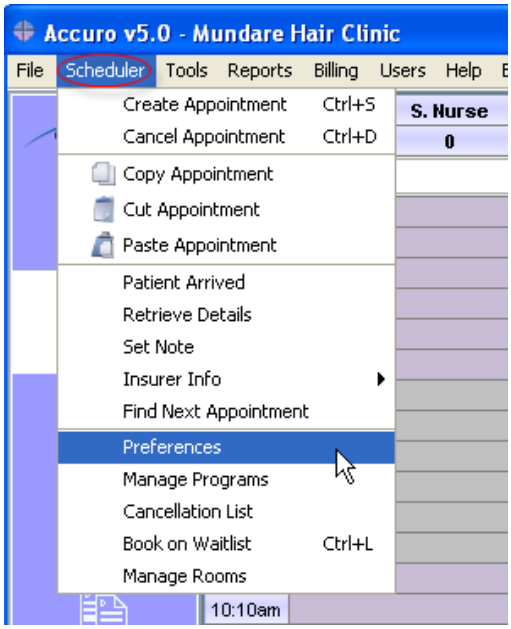
If a patient is on the **Cancellation List**, and an appointment is created for that patient, an alert box will appear letting the user know that the patient is on the list.



To remove the patient from the cancellation list once you have created an appointment for them

1. Click on the entry to highlight it, and click **Select.**

SCHEDULER MENU



Create Appointment

To create an appointment

1. Highlight a time slot on the **Scheduler**.
2. Select **Create Appointment** from under the **Scheduler** menu.

Cancel Appointment

To cancel an appointment

1. Click on an appointment to highlight it.
2. Select **Cancel Appointment** from under the **Scheduler** menu.

Copy Appointment

To copy an appointment

1. Click on an appointment to highlight it.
2. Select **Copy Appointment** from under the **Scheduler** menu.

Cut Appointment

To cut an appointment

1. Click on an appointment to highlight it.
2. Select **Copy Appointment** from under the **Scheduler** menu.

Paste Appointment

To paste an appointment

1. Highlight a time slot on the **Scheduler** that you wish to paste the appointment into.
2. Select **Paste Appointment** from under the **Scheduler** menu.

Patient Arrived

To arrive a patient

1. Click on an appointment to highlight it.
2. Select **Cancel Appointment** from under the **Scheduler** menu.

Retrieve Details

To view appointment details

1. Click on an appointment to highlight it.
2. Select **Retrieve Details** from under the **Scheduler** menu.

Set Note

To set a note for an appointment

1. Click on an appointment to highlight it.
2. Select **Cancel Appointment** from under the **Scheduler** menu.

Insurer Info

To open a WCB form for an appointment

1. Click on an appointment to highlight it.
2. Select **Insurer Info -> WCB Form** from under the **Scheduler** menu.

Find Next Appointment

To find an available appointment for a patient

1. Click on an appointment to load a patient.
2. Select **Find Next Appointment** from under the **Scheduler** menu. This will open a **Find Available Appointment** dialog.
3. Select a provider that you wish to book an appointment with from under **Schedules**.
4. Select a **Time Needed** using the drop-down lists.
5. Select a **Day of the Week** you wish to search on, or select **All**.
6. Enter **Between** times you wish to search on.

7. Optionally, you can choose a **Template Suggestion** to search on by clicking the checkbox and selecting a suggestion from the drop-down list.

8. Optionally, select **Rooms Required** from the drop-down list.

9. Click the **Search** button . This will give a list of openings that match your search criteria.

10. Click on an opening to select it and click **Go to Selected Opening**.

Preferences

See the section on **Scheduler Preferences** under **Scheduler**.

Cancelation List

See the section on **Cancelation List** under **Scheduler**.

Book on Waitlist

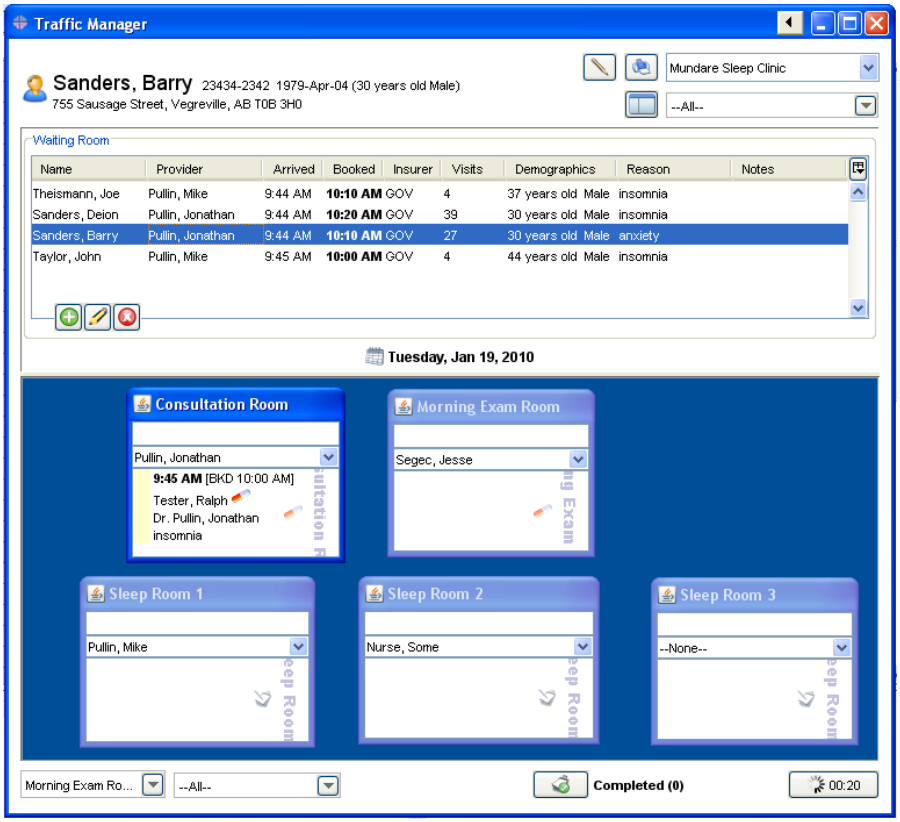
See the section on **Creating a New Booking Request** under **Waitlist**.

Manage Rooms

See the section on **Managing Rooms** under **Waitlist**.

TRAFIC MANAGER

The **Traffic Manager** is a visual tool which is used to manage the flow of patients in your clinic. Open the **Traffic Manager** by clicking the **Traffic** icon on the side panel of your Accuro.

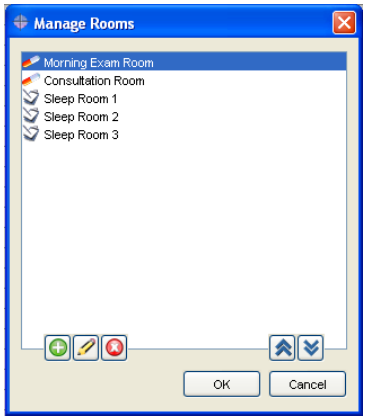

Traffic Manager
Sanders, Barry 23434-2342 1979-Apr-04 (30 years old Male)
755 Sausage Street, Vegreville, AB T0B 3H0
Mundare Sleep Clinic
--All--
Waiting Room
Name Provider Arrived Booked Insurer Visits Demographics Reason Notes
Theismann, Joe Pullin, Mike 9:44 AM 10:10 AM GOV 4 37 years old Male insomnia
Sanders, Deion Pullin, Jonathan 9:44 AM 10:20 AM GOV 39 30 years old Male insomnia
Sanders, Barry Pullin, Jonathan 9:44 AM 10:10 AM GOV 27 30 years old Male anxiety
Taylor, John Pullin, Mike 9:45 AM 10:00 AM GOV 4 44 years old Male insomnia
Tuesday, Jan 19, 2010
Consultation Room
Pullin, Jonathan
9:45 AM [BKD 10:00 AM]
Tester, Ralph
Dr. Pullin, Jonathan
insomnia
Morning Exam Room
Segec, Jesse
Sleep Room 1
Pullin, Mike
Sleep Room 2
Nurse, Some
Sleep Room 3
--None--
Morning Exam Ro...
--All--
Completed (0)
00:20

Managing Rooms

You must create rooms before you can put patients into them in the **Traffic Manager**.

To manage rooms

- Under the **Scheduler** menu heading, select **Manage Rooms**.

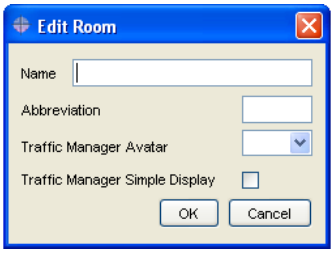


Once in the Manage Rooms Dialogue, you can create, edit, and delete rooms.

Creating a Room

To create a room

1. Click on the **Add** button . This will open the **Edit Room** Dialogue.



2. Type a room name into the **Name** text box.
3. Type a two letter abbreviation into the **Abbreviation** text box.
4. Select an **Avatar** from the drop-down list if required.

Editing a Room

To edit a room

1. Click on a room to select it.
2. Click on the **Edit** button .
3. Make any necessary changes.

Deleting a Room

To delete a room

1. Click on a room to select it.
2. Click the **Remove** button .

3. Click **Yes** to confirm the deletion.

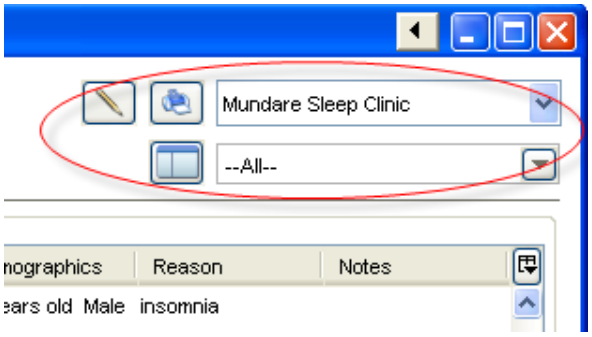
Organizing Rooms

To organize room order

- Use the arrow buttons to move rooms up and down on the list.

Functions Located at the Top-Right of the Traffic Manager

There are three buttons and two drop-down lists located at the top-right of the **Traffic Manager**. You can edit patient demographics, print a summary, change the view, select a different clinic, and filter which provider's patients to show in the **Waiting Room**.



Editing Patient Demographics

To edit patient demographics

1. Click on a patient to select them.
2. Click the button with a pencil icon .

Printing a Summary of the Traffic Manager

To print a summary of the Traffic Manager

- Click the button with the printer icon .

Changing the Scheduler View

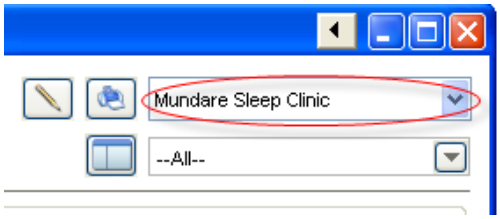
To change the scheduler view

- Click the **Change View** button . This will toggle how the **Waiting Room** and the other rooms are displayed.

Selecting a Different Clinic

To select a different clinic

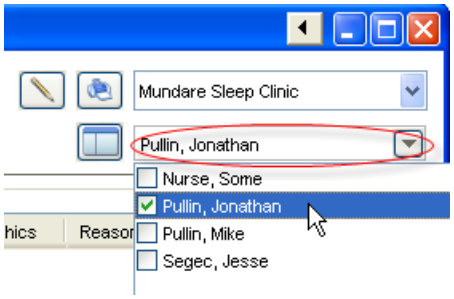
- If your Accuro is setup with more than one clinic, you can choose a different clinic from the **Clinic** drop-down list.



Filtering Provider Patients in the Waiting Room

To filter which provider's patients are shown in the Waiting Room

1. Click on the provider drop-down list.



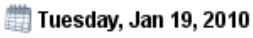
2. Click the checkbox beside each provider whose patients you wish to appear in the **Waiting Room**.

3. To have all provider patients appear, uncheck all providers. The list will default to **All**.

Changing the Date

To change the date

1. Click on the date beside the calendar icon.

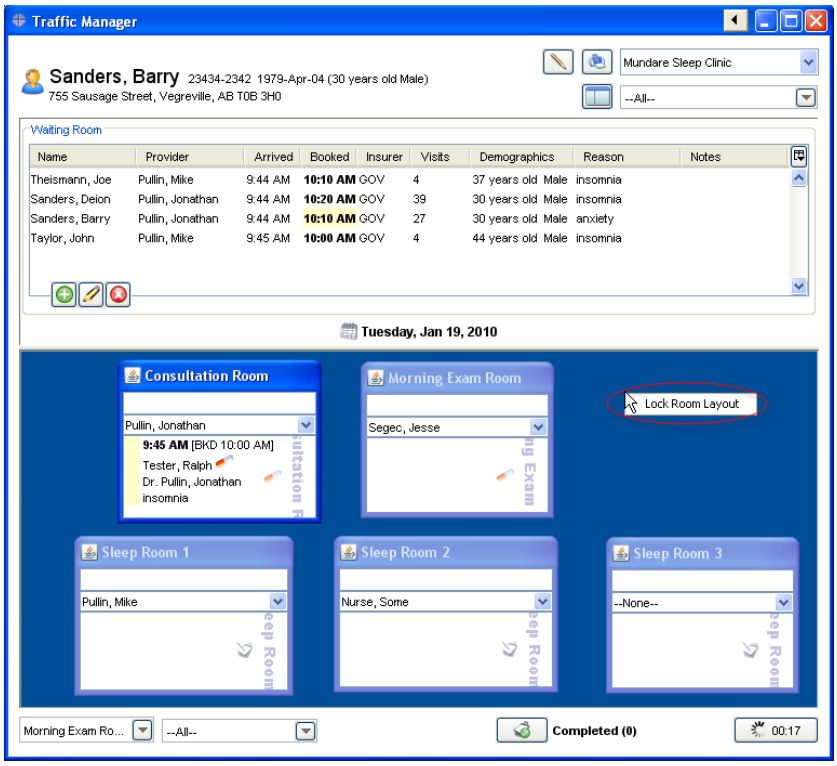


2. Select a date from the popup calendar.

Rearranging Room Layout

To Rearrange Room Layout

1. Make sure the **Room Layout** is not locked. To unlock the layout:
    1. Right-click anywhere on the blue background.
    2. If **Lock Room Layout** is checked, deselect it.


Traffic Manager
Sanders, Barry 23434-2342 1979-Apr-04 (30 years old Male)
755 Sausage Street, Vegreville, AB T0B 3H0
Mundare Sleep Clinic
--All--
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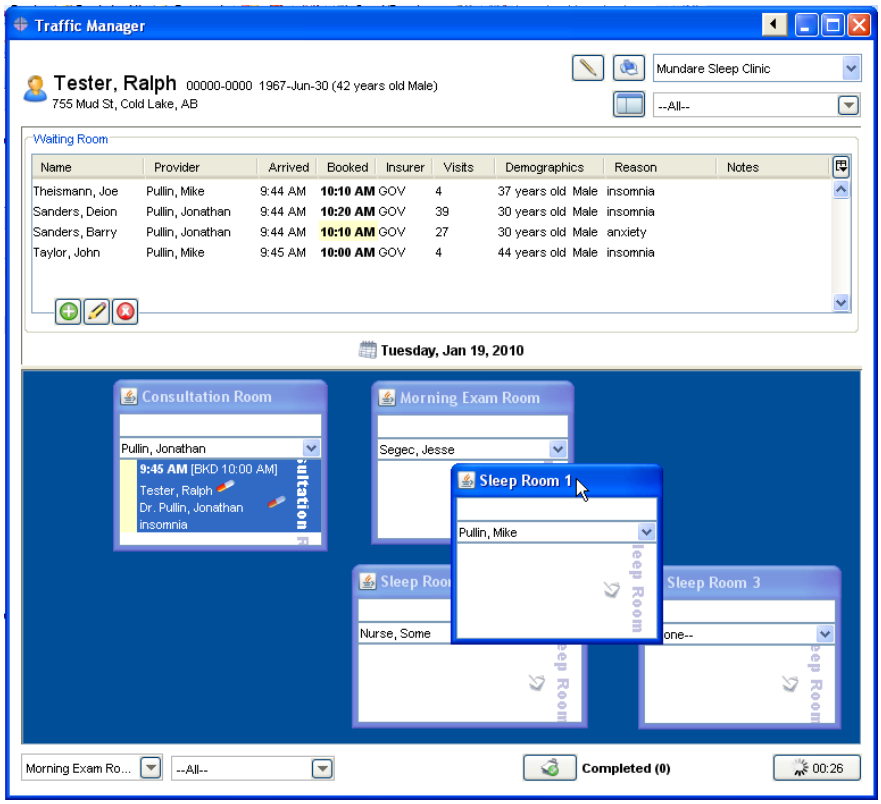
Tuesday, Jan 19, 2010
Consultation Room
Pullin, Jonathan
9:45 AM [BKD 10:00 AM]
Tester, Ralph
Dr. Pullin, Jonathan
insomnia
Morning Exam Room
Segec, Jesse
Lock Room Layout
Sleep Room 1
Pullin, Mike
Sleep Room 2
Nurse, Some
Sleep Room 3
--None--
Morning Exam Ro...
--All--
Completed (0)
00:17

2. Point to the **Title Bar** of the **Room** you wish to move.

3. Click and drag the **Room** to the area of the **Room Layout** you wish to put it.


Traffic Manager
Tester, Ralph 00000-0000 1967-Jun-30 (42 years old Male)
755 Mud St, Cold Lake, AB
Mundare Sleep Clinic
--All--
Waiting Room
Name Provider Arrived Booked Insurer Visits Demographics Reason Notes
Theismann, Joe Pullin, Mike 9:44 AM 10:10 AM GOV 4 37 years old Male insomnia
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Segec, Jesse
Sleep Room 1
Pullin, Mike
Nurse, Some
Sleep Room 3
Morning Exam Ro...
--All--
Completed (0)
00:26

4. Repeat until all **Rooms** are in their desired location.

5. Lock the **Room Layout** by right-clicking anywhere on the blue background and selecting **Lock Room Layout**.

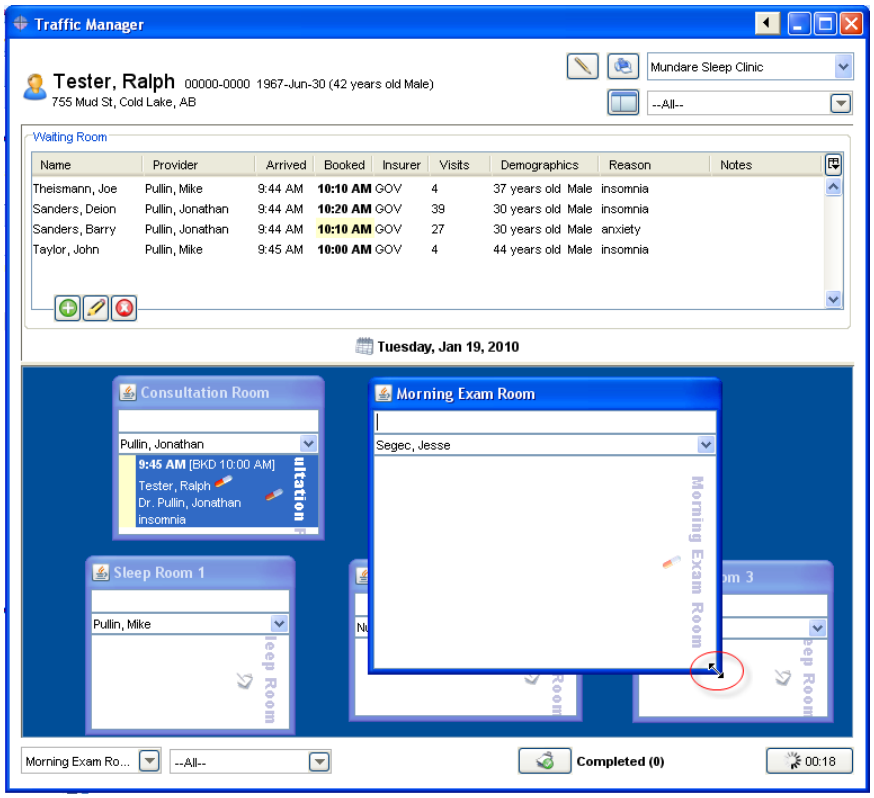
Resizing a Room

To resize a room

1. Make sure the **Room Layout** is not locked.

2. Move the mouse over the edge of a **Room** until the pointer turns into a double-headed arrow .

3. Click and drag to resize the **Room**.


Traffic Manager
Tester, Ralph 00000-0000 1967-Jun-30 (42 years old Male)
755 Mud St, Cold Lake, AB
Mundare Sleep Clinic
--All--
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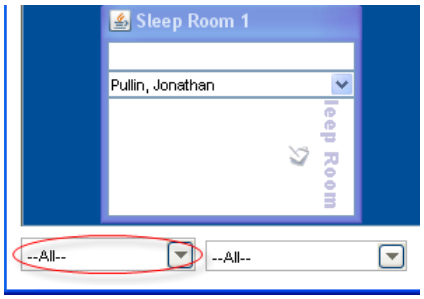
insomnia
Morning Exam Room
Segec, Jesse
Sleep Room 1
Pullin, Mike
Morning Exam Ro...
--All--
Completed (0)
00:18

Functions Located at the Bottom of the Traffic Manager

Selecting Rooms to Show

To select which Rooms are shown in the Room Layout

1. Click on the **Exam Room** drop-down list.



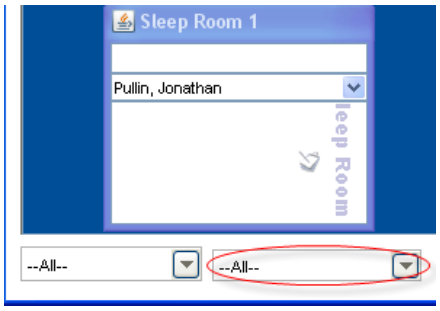
2. Click the checkbox beside each **Room** you wish you appear in the **Room Layout**.

3. To have all **Rooms** appear, uncheck all **Rooms**. The list will default to **All**.

Selecting Provider Rooms to Show

To select which providers are shown in the Room Layout

1. Click on the **Provider Room** drop-down list.



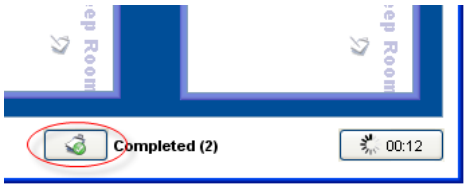
2. Click the checkbox beside each provider whose **Room** you wish you appear in the **Room Layout**.

3. To have all **Provider Rooms** appear, uncheck all providers. The list will default to **All**.

Showing Completed Visits

To show a list of completed visits

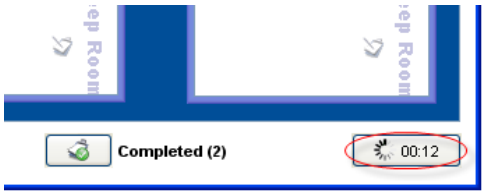
- Click the **Completed Visits** button located at the bottom of the **Traffic Manager**. This will open the **Completed Visits** Dialogue.



Syncing with the Scheduler

To sync the Traffic Manager with the Scheduler

- Click the **Sync** button located at the bottom-right of the **Traffic Manager**. This will sync appointment status information (such as Arrived) with the **Scheduler**.

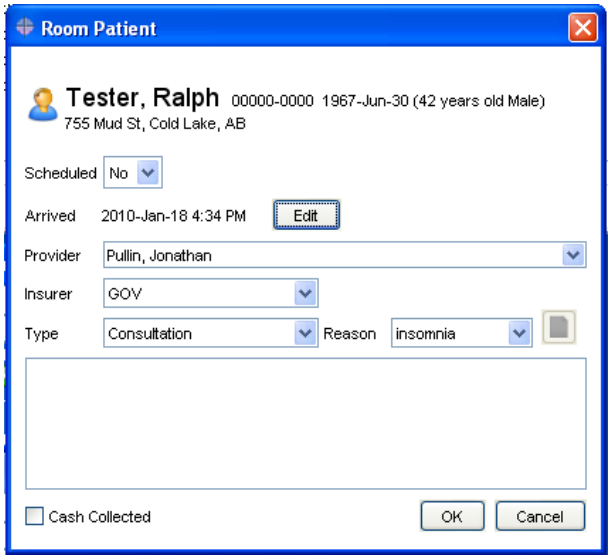


Traffic Manager Workflow

Arriving a Patient

To arrive a patient into the Waiting Room

1. Click the **Plus** button .
2. Select a patient from the list. This list shows patients that have booked appointments in the **Scheduler**. If the patient does not have an appointment:
    1. If the patient is in Accuro, search for the patient using the **Search Tool** and select them.
    2. If the patient is not in Accuro, click **New Patient** to add a new patient.
3. Complete the **Room Patient** Dialogue:



    1. Edit the **Arrived** time if required.
    2. Select a **Provider**, **Insurer**, **Type**, and **Reason** if required.
    3. Type any notes into the text box.
    4. If the patient has paid for the visit upfront, click on the **Cash Collected** checkbox.

Editing a Patient

To edit patient info in the Waiting Room

1. Click on a patient in the **Waiting Room** to select them.
2. Click on the **Edit** button .
3. Make any changes as required.

Deleting a Patient

To delete a patient from the Waiting Room

1. Click on a patient in the **Waiting Room** to select them.
2. Click on the **Delete** button .

Assigning a Provider to a Room

To assign a provider to an Exam Room

- Select a provider from the **Provider** drop-down list located on each room.

Moving a Patient to a Room

To move a patient to an Exam Room

1. Point to the patient in the **Waiting Room**.
2. Click and drag the patient to the desired **Exam Room**.
3. Complete the **Room Patient** Dialogue and click **OK**.

Once a Patient is in a Room

Once a patient is in an **Exam Room**, you have multiple options using right-click:

Edit Details – This will bring up the **Room Patient** Dialogue for editing.

Completed – Once the appointment is complete, this will move the patient out of the **Traffic Manager**.

Send to Wait Room – Use this to move the patient back to the **Waiting Room**.

Claim Details – This will open the **Claim Details** Dialogue (the bill) for the visit.

Appointment History – This will show the patient's **Quick Patient Appointment View** Dialogue (also accessed using F4 on the keyboard).

Go to EMR – This will open the patient's **EMR** section.

Virtual Chart – This will open the **Quick Patient Summary** Dialogue (also accessed using F3 on the keyboard).

Tasks – This will open the **Patient Tasks** Dialogue (also accessed using F7 on the keyboard).

Clear Notifications –

Delete – Remove the patient from the **Traffic Manager**.

PATIENTS

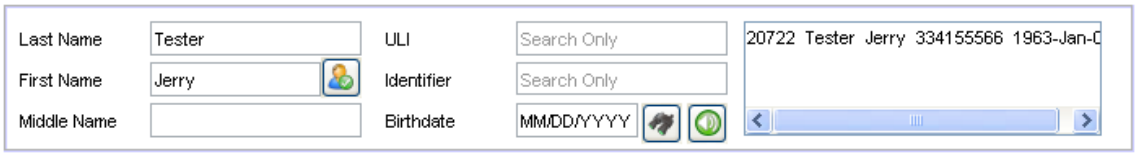
Main Functions

The main functions are always available in the **Patients** section of Accuro.

Patient Search Tool

The patient **Search Tool** can be used to find patients in the database. You can search on **First Name**, **Last Name**, **Middle Name**, **Healthcare Number**, **Identifier** (File Number), and **Birthdate**.

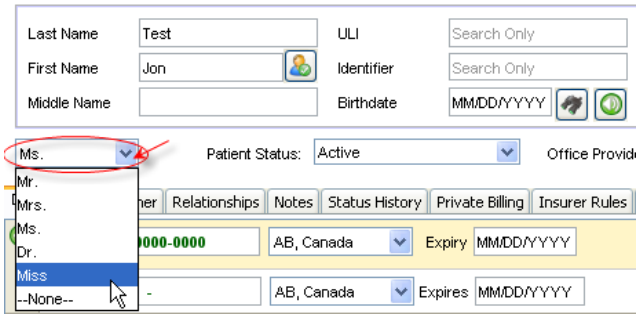
There is also a "Sounds Like" button which allows you to search on a name where spelling is uncertain.



Patient title

To set the title of a patient

1. Select a title from the **Title** drop-down list located below the **Middle Name** search field.



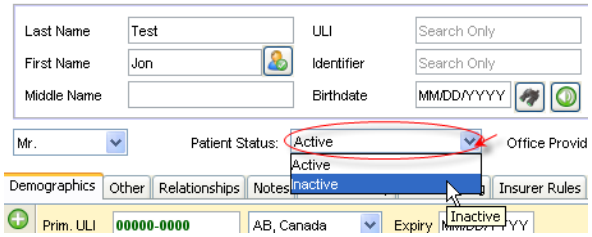
2. Click **Update Patient**.

   ➢ To set the default title or to disable defaults, see **User Preferences**.

Patient Status

To set the status of a patient

1. Select a status from the **Patient Status** drop-down list.



2. Click **Update Patient**.

Office Provider

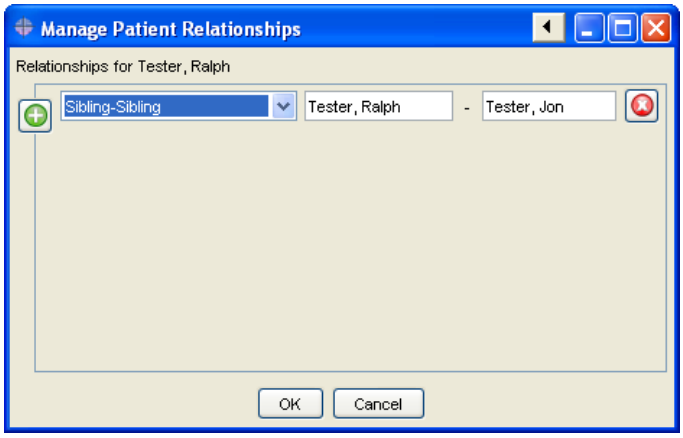
To set the office provider of a patient

1. Click the button showing an elipses beside the Office Provider text box.
2. Providers that exist in your clinic will show up in the search results by default. To select one, click on the provider's name to select them and click **Selec t**.
3. Click **Update Patient**.

Patient Relationships

To manage patient relationships

1. Click the **Patient Relationships** button at the bottom of the screen. This will open the **Manage Patient Relationships** Dialogue which shows the relationships of the loaded patient.



2. ***To create a new relationship***:
    1. Click the **Plus** button . This will add a **Relationship** entry.
    2. Select a **Relationship Type** from the drop-down list.
    3. Use the search tool for the two **Patient Name** fields.
    4. Click **OK**.
3. ***To delete a relationship***:
    1. Click on a relationship to select it.
    2. Click the **Remove** button .

Print Patient Summary

To print a patient summary

- Click the button with the printer icon located at the bottom of the screen, or press F9 on your keyboard.

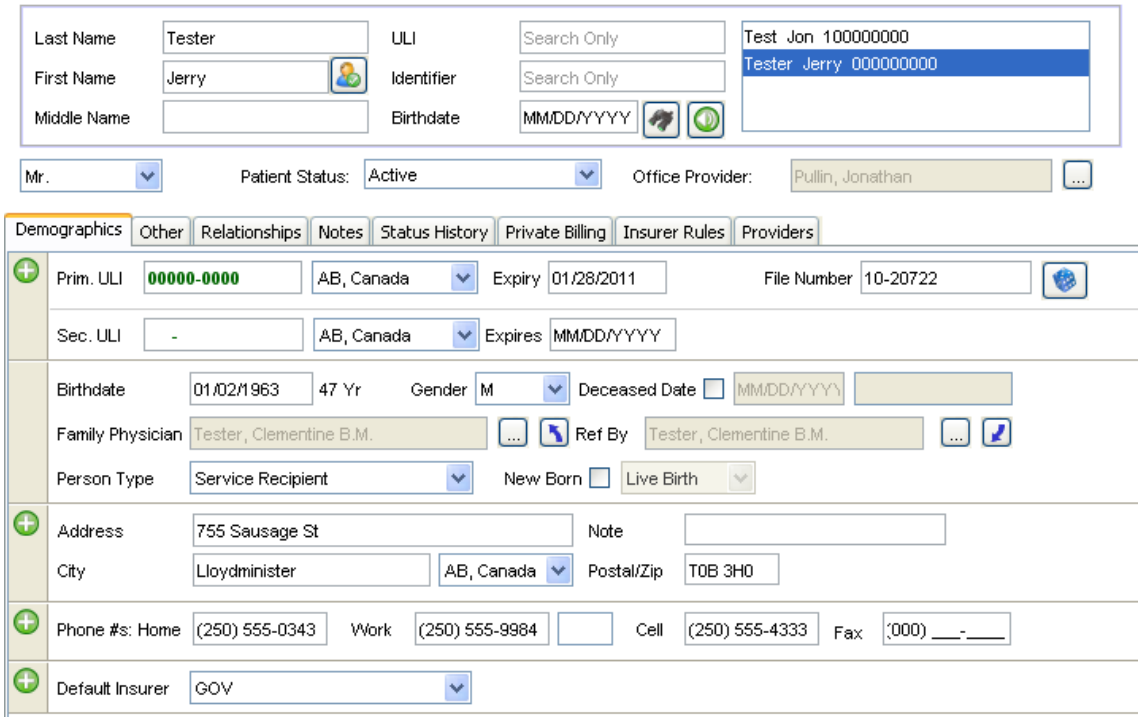
Patient Merge

To merge two patients

1. Load the patient that you wish to merge using the **Search Tool**. This patient will be deleted from Accuro. All records from this patient will be added to the chart of the second patient.
2. Click the **Merge** button located at the bottom of the screen.
3. Enter the name of the patient you wish to have the first patient merged with. Press "**Enter**" on your keyboard. Select the patient. Click the **Merge** button.
4. Confirm the **First Name** merge by clicking on the checkbox and clicking **Continue**.
5. Confirm the merge one final time.

Patient Demographics

The patient demographics tab contains demographic information for each patient. Information such as Health Care Number, Birth Date, and Address are stored here.



Adding a Patient

To add a new patient

1. Click **Clear** at the bottom of the screen, or press **F1** on the keyboard.
2. Fill in all required fields. These include **First Name**, **Last Name**, **Health Number**, and **Birthdate**.
3. Click **Add Patient**.

Updating a Patient

To update a patient

1. Load the patient using the **Search Tool**.
2. Enter any data or changes.
3. Click **Update Patient**.

Deleting a Patient

To delete a patient

1. Load the patient using the **Search Tool**.
2. Click **Delete Patient**.

Other

The Other tab contains additional fields such as Employer and Pharmacy Contact information.

Employer Contact – Click the Address Book button to select an Employer Contact

Pharmacy Contact – Click the Address Book button to select a Pharmacy Contact

Email Address – Click the Add button beside this to add additional email addresses

Registration Number --

Referral Date –Date the patient was referred to the clinic

Previous WCB Claims – Stores a list of WCB claim numbers

Global Message – A popup box will appear containing this text for all users anytime this patient is loaded

Your Message – A popup box will appear containing this text for the current user only

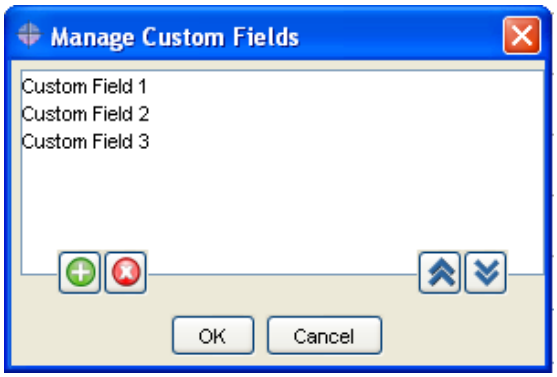
Custom Fields

Custom Fields are additional text fields that can be added and titled by the user.

Managing Custom Fields

To manage custom fields

1. Click on the **Pencil** icon beside **Custom Fields**.



2. Use the **Add** and **Remove** buttons to create and delete fields.
3. Use the **Arrow buttons** to change the order of your custom fields.
4. Click **OK**.

Managing Aliases

Aliases are used when a patient is known by a second name. The alias will refer to the same patient file.

To add an alias

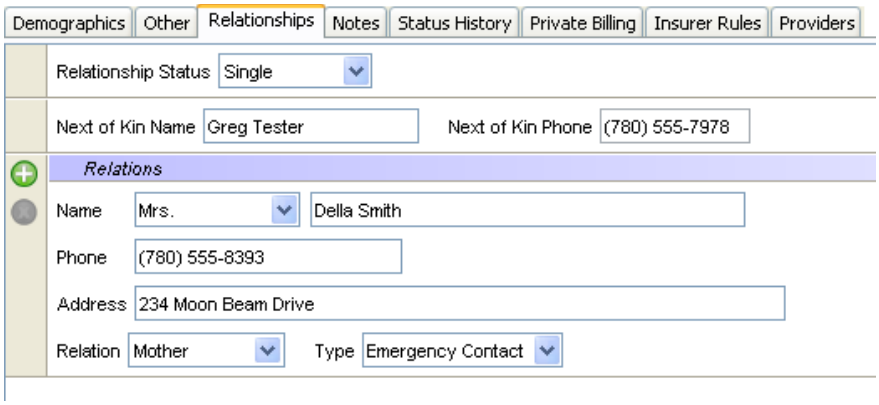
1. Click on the **Add** button beside **Alias**.
2. Enter a **Last** and **First Name**.
3. Choose an **Alias Type** from the drop-down list. You can manage **Alias Types** by selecting **Manage**.
4. Click **Update Patient**.

To remove an alias

1. Click on the alias to select it.
2. Click the **Remove** button beside the alias.

Relationships

This tab is used to store **Relationship Status**, **Next of Kin** contact information, and other **Relations** contact info.



Setting Relationship Status

To set relationship status

- Select the patient's status from the drop-down list.

Setting Next of Kin

To set next of kin information

- Enter the **Next of Kin Name** and **Phone Number** in the respective text-boxes.

Managing Relations

To add a relation

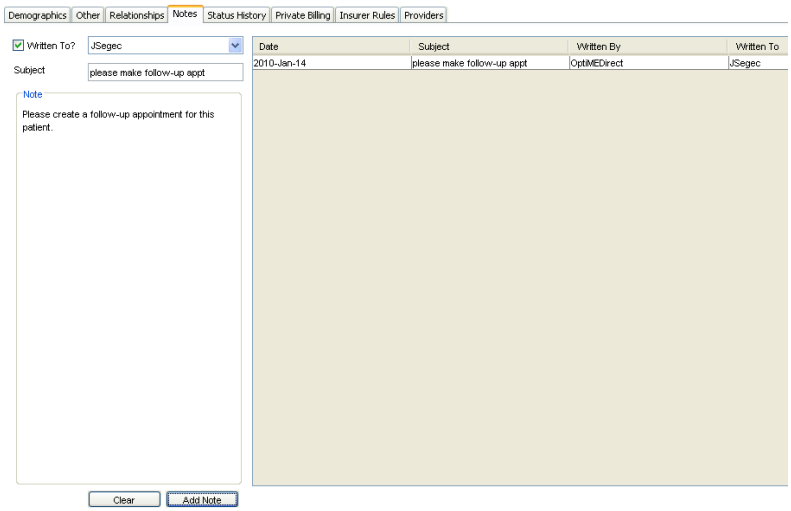
1. lick the **Add** button .
2. Select the **Title** from the drop-down list and enter the contact's **Name**.
3. Enter the **Phone** number and **Address**.
4. Select the **Relation** type from the drop-down list.
5. Select the **Type** of contact (Emergency contact or Next-of-kin).
6. Click **Update**.

To remove a relation

1. Click on a **Relation** to select it.
2. Click the **Remove** button next to the **Relation**.

Notes

Notes can be attached to a patient either as part of their record or to serve as communication amonGST staff members concerning the patient.



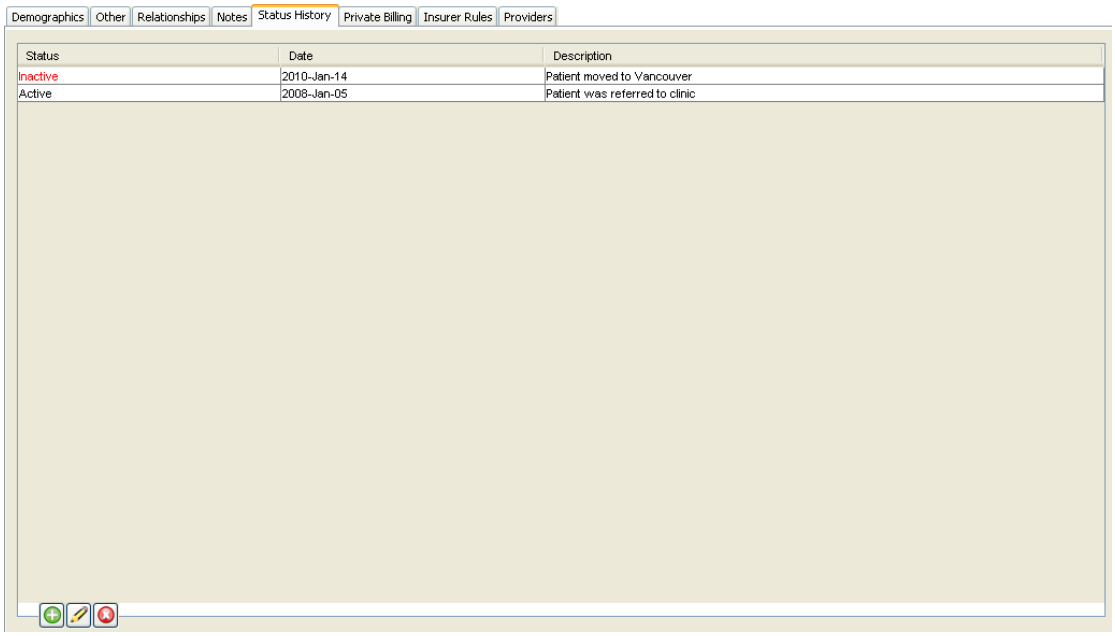
Adding a note

To add a note

1. If the note is to be sent to a staff member's inbox, click on the **Written To?** checkbox and select a staff member from the drop-down list. Otherwise the note will only be attached to the patient's **Virtual Chart**.
2. Type a **Subject** in the text box.
3. Type a message in the **Note** text box.
4. Click **Add Note**. An entry will appear in the right side table for the note.
5. Click **Clear** to clear the fields for the next entry.

Status History

Status History is used to save a record of a patient's status in the office. By default the two status options available are **Active** and **Inactive**.



Adding a New Status

To add a status entry

1. Click the **Add** button at the bottom of the screen.
2. Select a status from the drop-down list under the **Status** column.
3. Change the **Date** if required.
4. Enter a **Description** if required.

Removing a Status

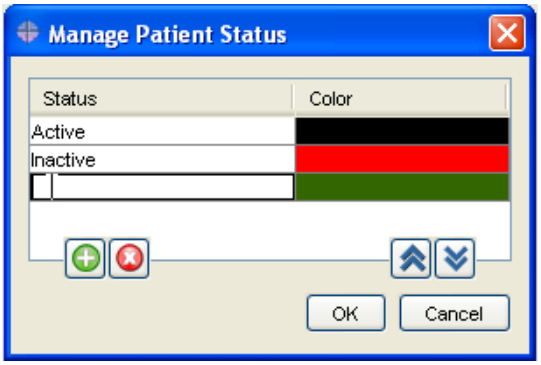
To remove a status entry

1. Click on an entry to highlight it.
2. Click the **Remove** button .

Managing a Status

To manage statuses

1. lick the **Edit** icon at bottom of the screen . This will open the **Manage Patient Status** Dialogue.



2. Use the **Add** and **Remove** buttons to create and delete **Status** lines.
3. Use the **Arrow** buttons to change the order. The first **Status** in the list will be the default.
4. Double-click on the **Status Column** to edit the name of the **Status**.
5. Double-click on the **Color Column** to choose a color for the **Status**.

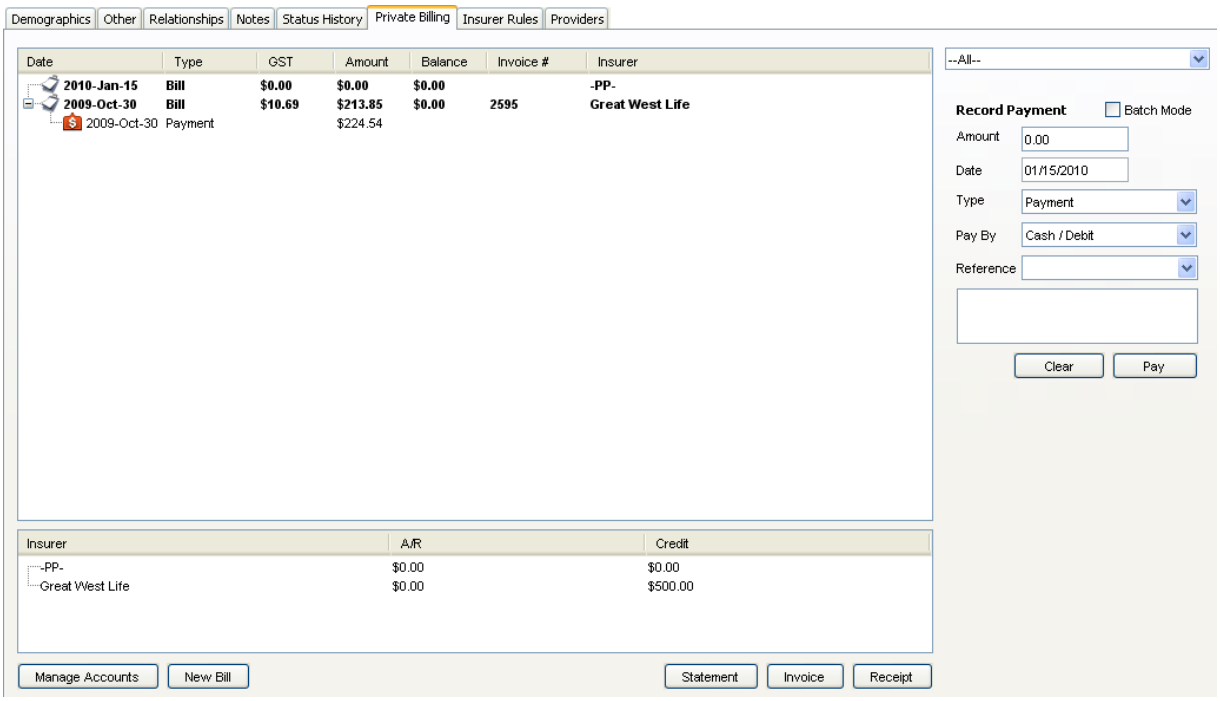
Private Billing

Private Billing is used for any payments that are paid directly to the clinic either by the patient or by a private insurer.

The main table shows invoices and payments listed by date. The type (either bill or payment), GST, amount, balance, invoice number, and insurer are also shown in this table.

The bottom table shows insurers available to the client.

The **Record Payment** area on the right side is used to apply payments and credits.



Creating a New Bill

To create a new bill

1. Click the **New Bill** button.
2. Enter the **Claim Details**. Click **Save and Close**. (For more information on the Claim Details Dialogue, refer to the Claims section of the user guide).

Applying a Payment to a Bill

To apply a payment to a bill

1. Click on a bill to select it.
2. In the **Record Payment** section, type a payment amount into the **Amount** text field. If it is a refund, type it as a negative number.
3. Change the **Date** of payment if required.
4. Select the **Type** of payment or refund.
   - ➢ If the type is **Pay from Credit**, then the selected **Insurer** for the bill must have enough credit on the patient's account.
5. Select the **Pay By** method.
   - ➢ Select **Manage** to add additional methods.
6. Type in or select a **Reference**, if required.
7. Type any additional information into the text area.

8. Click **Pay**.

Printing a Statement of Transactions

To print a statement of transactions over a time period

1. Click on the **Statement** button.
2. Select a **Date Range**.
3. Click **OK**.

Generating an Invoice

To generate an invoice (showing the amount owing)

1. Click on a bill to select it.
2. Click on the **Invoice** button.

Printing a Receipt

To print a receipt (showing the amount paid)

1. Click on a bill to select it.
2. Click on the **Receipt** button.

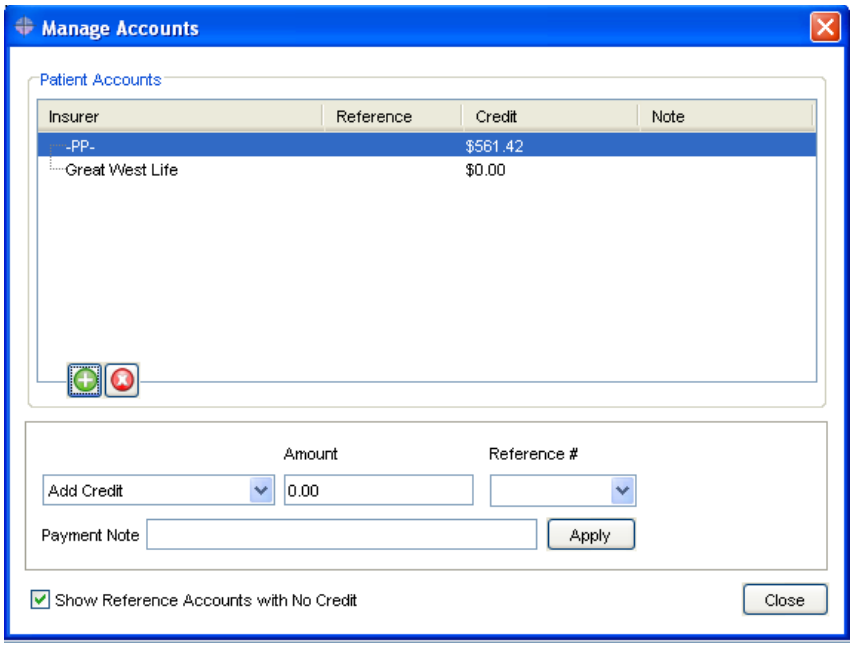
Patient Insurer Accounts

You can create insurer accounts and manage insurer account balances using the **Manage Accounts** button.

Managing Patient Accounts

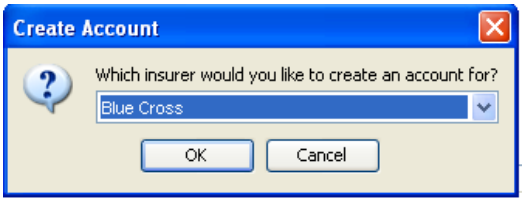
To manage patient accounts

- Click on **Manage Accounts**. This will open the **Manage Accounts** Dialogue.



To create an account for an insurer under this patient

1. Click the **Add** button .
2. Select the insurer you wish to create an account under this patient for from the drop-down list.



- Insurers can be added to Accuro by going under the **Billing Menu** and selecting **Manage Insurers**. See **Manage Insurers**.

To remove an insurer account

1. Click on an insurer to highlight it.
2. Click the **Remove** button .

Adding a Credit or Issuing a Refund

To add a credit or issue a refund to an insurer account

1. Click on an insurer to highlight it.
2. Select the type of transaction from the drop-down list.
3. Type the amount of the transaction in the **Amount** text box.
4. Select a **Reference** number from the drop-down list.

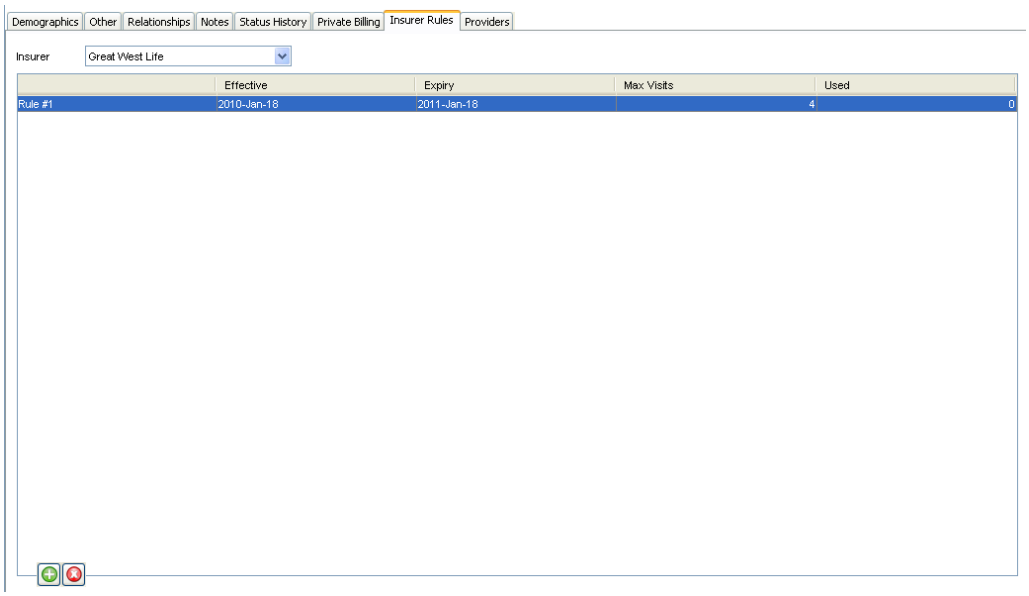
5. Type in a **Payment Note** if required.

6. Click **Apply**.

    - To give a credit to a patient, apply the credit to **Private Payment** (**-PP-**).

Insurer Rules

Insurer rules are used to keep track of an insurer's effective date, expiry date, the maximum visits allowed, and how many visits the patient has used.



Adding an Insurer Rule

To add an insurer rule

1. Select an insurer from the **Insurer** drop-down list.

    - Insurers can be added to Accuro by going under the **Billing Menu** and selecting **Manage Insurers**. See **Manage Insurers**.

2. Click the **Add** button . This will add a new rule.

3. Change the **Effective** and **Expiry** dates by clicking on those fields and choosing a date from the popup mini calendar.

4. Double-click on the **Max Visits** field and type in the maximum amount of visits.

Deleting an Insurer Rule

To delete an insurer rule

1. Click on a rule to select it.

2. Click the **Remove** button .

Providers

The **Providers** tab is used to record a history of which providers the patient has seen in the office, and which providers the patient has been referred to and referred from.

Care Teams

A care team can be assigned to the patient. A care team consists of a team of providers in the clinic.

To manage care teams

- Under the **Configuration** menu, select **Care Teams**. This will open the **Care Teams** Dialogue.

To create a care team

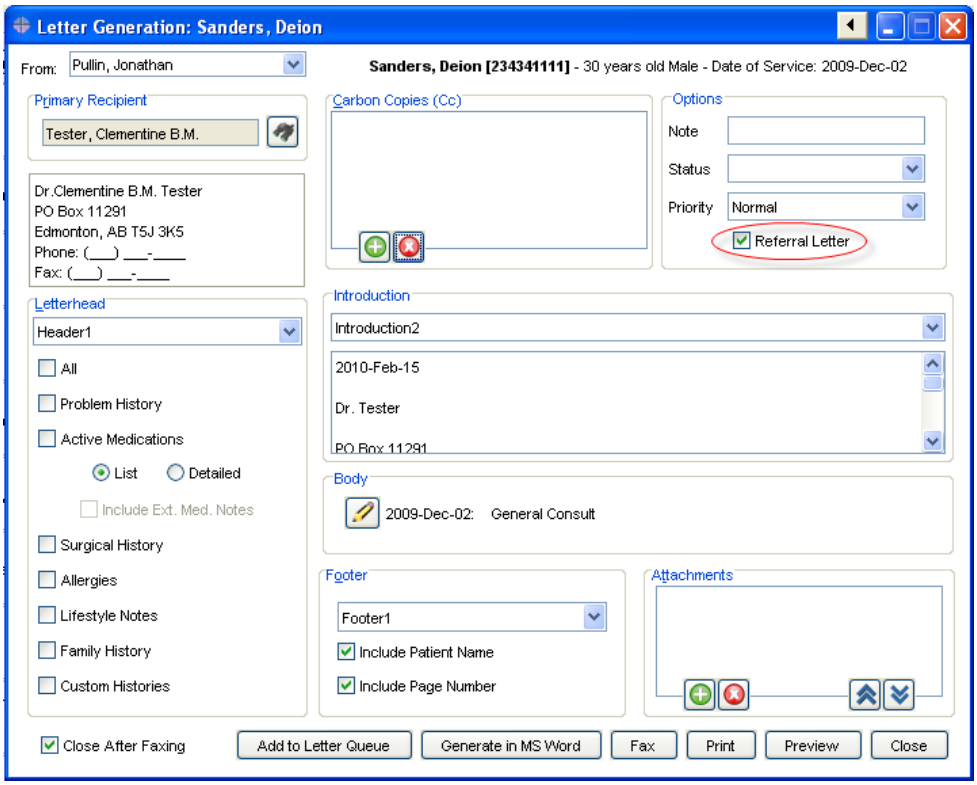
1. Under the **Care Team** drop-down list, select **New**.
2. Type in a **Care Team** name.
3. Click the **Add** button.
4. Select the **Office Providers** you wish to add to the team. Hold **CTRL** to select more than one.
5. Click **Save**.

To add a care team to a patient

1. On the **Providers** tab of the **Patients** section, click the **Add** button beside **Care Teams**.
2. Select a **Care Team** from the drop-down list.
3. Click **OK**.

Referrals

You can keep a record of which doctors a patient was referred to by clicking on the **Referral Letter** checkbox when generating a referral letter.



When you print or fax the letter, an entry will be added under **Referrals** on the **Providers** tab.

Clinic Providers Seen

Clinic Providers Seen shows a record of which **Office Providers** the patient has had appointments with, and the date of the last visit with each provider.

Manually Added

You can manually add a **Referred To** or **Referred By** provider by clicking the **Add** button beside **Manually Added**.

Filters

You can filter the providers shown by **Status**, **Physician**, **Specialty**, **Type**, and **Notes**.

To set a filter

1. Click the **Filters** button.
2. Choose the filters you wish to add, by clicking on the checkbox and making a selection from the pulldown-menu next to it.
3. Click **OK**.

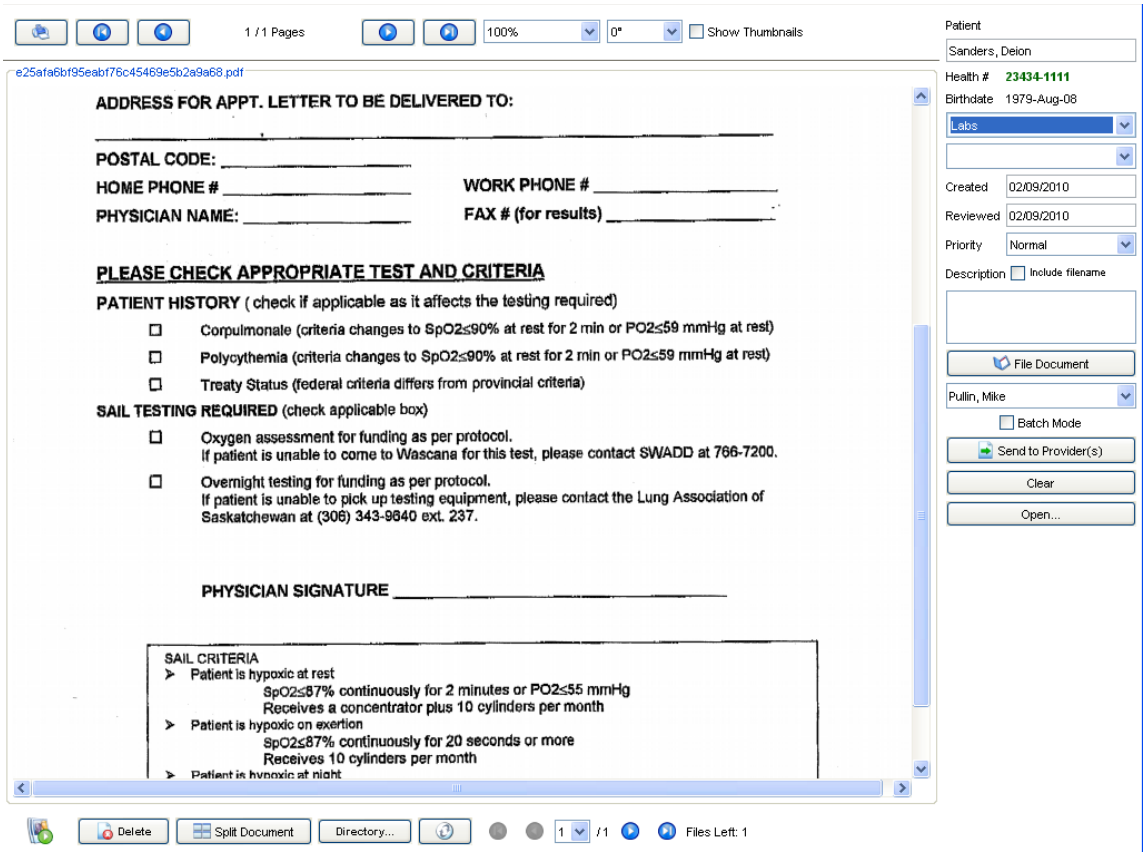
To remove filters

- Click **Clear Filters**.

DOCUMENTS

Documents

The **Documents** section is used to electronic documents into Accuro and associate them with patient files. Documents from sources such a faxes and scanners can be viewed, manipulated, send to providers for reviewing and attached to patients' **Virtual Charts**.

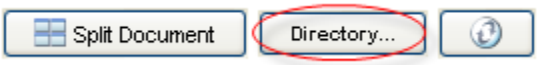

1 / 1 Pages
100%
0°
Show Thumbnails
e25afa6bf95eabf76c45469e5b2a9a68.pdf
ADDRESS FOR APPT. LETTER TO BE DELIVERED TO:
POSTAL CODE:
HOME PHONE #
WORK PHONE #
PHYSICIAN NAME:
FAX # (for results)
PLEASE CHECK APPROPRIATE TEST AND CRITERIA
PATIENT HISTORY (check if applicable as it affects the testing required)
Corpulmonale (criteria changes to SpO2≤90% at rest for 2 min or PO2≤59 mmHg at rest)
Polycythemia (criteria changes to SpO2≤90% at rest for 2 min or PO2≤59 mmHg at rest)
Treaty Status (federal criteria differs from provincial criteria)
SAIL TESTING REQUIRED (check applicable box)
Oxygen assessment for funding as per protocol.
If patient is unable to come to Wascana for this test, please contact SWADD at 766-7200.
Overnight testing for funding as per protocol.
If patient is unable to pick up testing equipment, please contact the Lung Association of Saskatchewan at (306) 343-9840 ext. 237.
PHYSICIAN SIGNATURE
SAIL CRITERIA
Patient is hypoxic at rest
SpO2≤87% continuously for 2 minutes or PO2≤55 mmHg
Receives a concentrator plus 10 cylinders per month
Patient is hypoxic on exertion
SpO2≤87% continuously for 20 seconds or more
Receives 10 cylinders per month
Patient is hypoxic at night
Patient
Sanders, Deion
Health # 23434-1111
Birthdate 1979-Aug-08
Labs
Created 02/09/2010
Reviewed 02/09/2010
Priority Normal
Description Include filename
File Document
Pullin, Mike
Batch Mode
Send to Provider(s)
Clear
Open...
Delete
Split Document
Directory...
1 /1
Files Left: 1

Setting Up the Documents Directory

Before you can view documents, you must select the directory on your hard drive or network where the documents are located.

To select the directory

1. Click on the **Directory** button at the bottom of the screen.



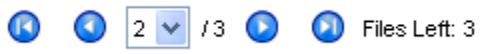
2. Browse to the folder which contains the documents you wish you upload and click **Open**. By default, it is **ReadyForAccuro.**

Browsing between Documents

If a folder contains multiple documents, you can browse between them to find the one(s) you want.

To browse between documents

1. Use the **Arrows** at the bottom of the screen to navigate between documents in the folder. The inner two arrows will move between documents one at a time in each direction. The outer two arrows will move to the first and last document, respectively



2. You can also navigate between documents by using **Thumbnails**. To show thumbnails, click the **Show Thumbnails** icon located at the bottom left of the screen

Zooming and Rotating Documents

Sometimes documents are scanned in upside down, or come in with small fonts which are difficult to read. In these cases you can rotate the documents and zoom in and out for easier reading. Accuro will save the changes you make when you file the document to a patient's **Virtual Chart**.

To zoom in on a document

- You can zoom in or out on a document by selecting the **Zoom** drop-down box at the top of the screen.

To rotate a document

- If a document gets scanned upside down, you can rotate it by using the **Rotate** drop-down box. You can rotate a document 90°, 180°, and 270°

Multipage Documents

Sometimes a document will contain more than one page. One document may contain pages related to different patients which must be split apart and filed separately.

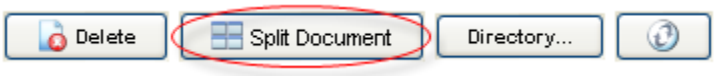
To move between pages of a multipage document

1. Use the **Arrow** keys at the top of the screen to move between pages of a multipage document. The inside keys will move one page at a time in the direction of the arrow. The outside keys will move to the first and last page, respectively.

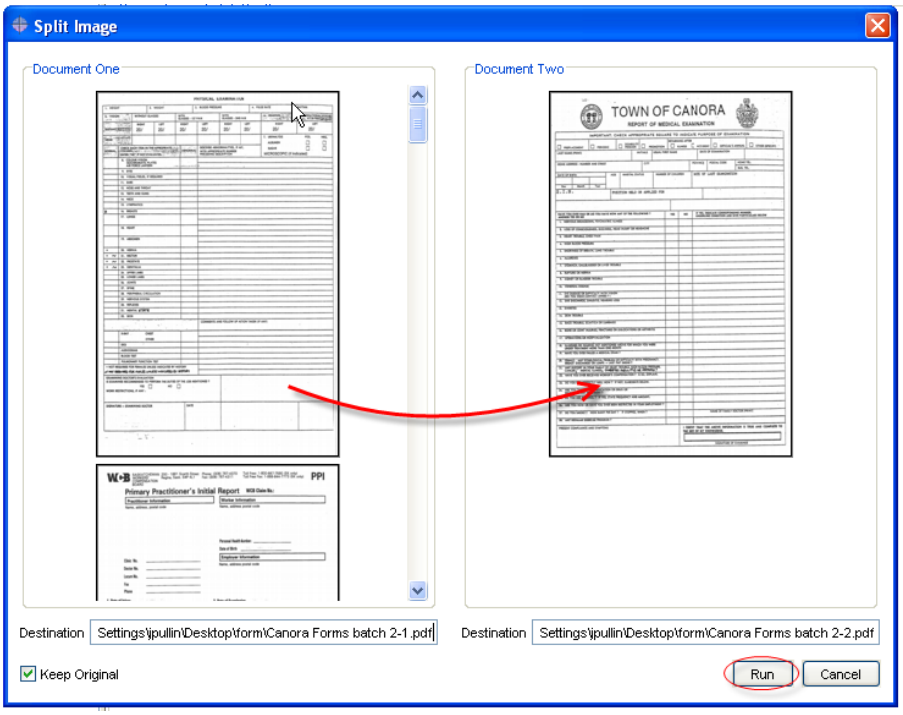
2. You can view thumbnails of the different pages of a multipage document by clicking on the **Show Thumbnails** checkbox, located at the top of the screen to the right of the Zoom Drop-down Box.

To split a document

1. To split a multipage document into two documents, click on the **Split Document** button.



2. Click and drag the pages that you wish to split from the left hand side (**Document One**) to the right hand side (**Document Two**).



3. Click **Run** to create the new document

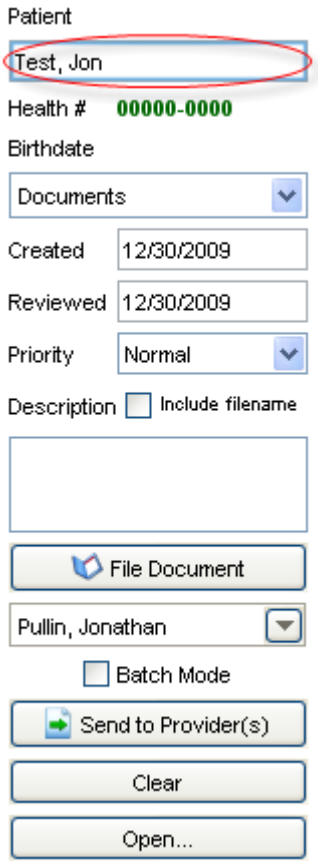
4. To keep the original document as it was, select the **Keep Original** checkbox in the bottom left hand corner. Otherwise the split pages will be removed from the original.

Filing Documents

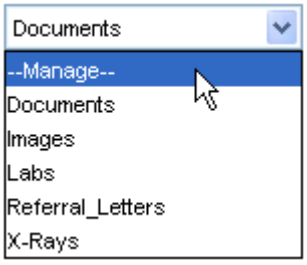
To save a document in Accuro you must file it to a patient's **Virtual Chart**.

To file a document

1. If a patient has not been loaded, select a patient with the **Search Tool** in the upper-right corner.



2. Select the **Document Type** from the drop-down list below the patient's name. You can add and remove document types by selecting **Manage** from the drop-down box.



3. Select the **Created** date using the pop-up calendar. The default is the current date.

4. Type in a comment in the **Description** text-box if required. You can include the filename in the description by clicking on the checkbox beside **Include Filename.**

5. If the document has been reviewed:

    1. Select the **Reviewed** date using the pop-up calendar. The default is the current date.

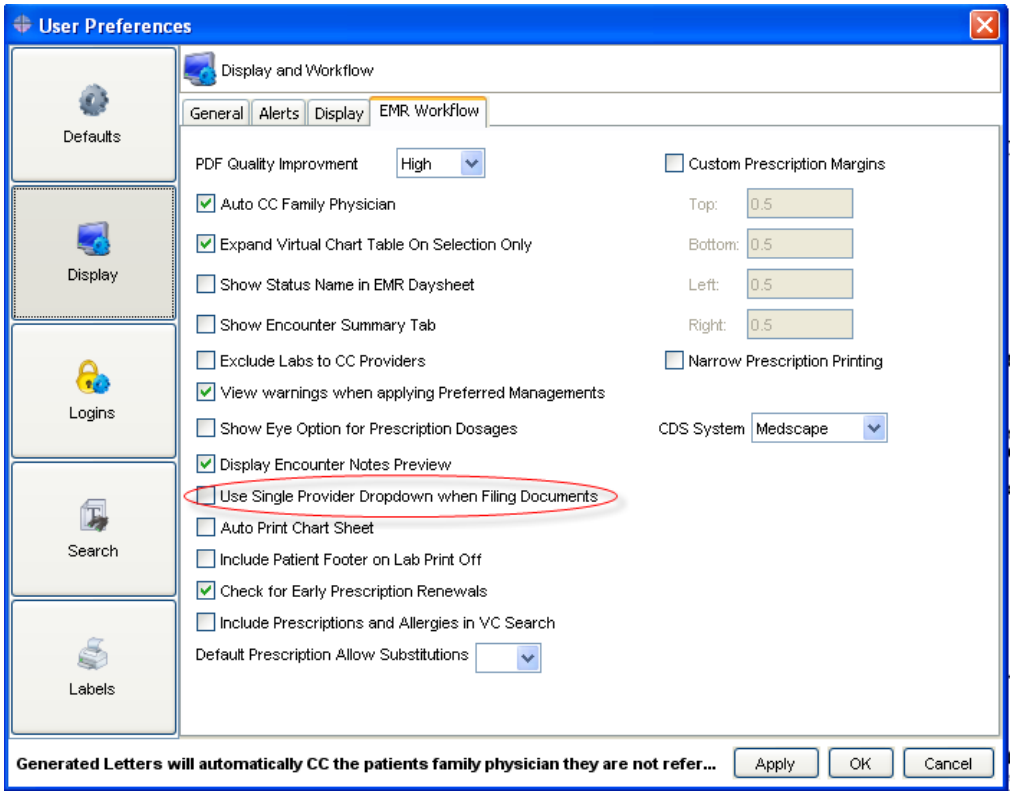
    2. Select the **Provider** you want the document attached to.

3. Click **File Document** to attach the document to the patient's chart. The document will be marked as reviewed.

If the document requires reviewing:

1. *Select the priority from the **Priority** drop-down list.*
2. Select the **Provider** you wish to send the document to for reviewing.
3. Click **Send to Provider(s)**

- You can send to more than one provider. This is a user preference. Under the **File** menu, select **User Preferences**. Click on **Display**, and the **EMR Workflow** tab. Uncheck **Use Single Provider Dropdown when Filing Documents**, and click **Apply**. You will now be able to select multiple providers.



Opening, Printing, and Deleting Documents

To open a document

- To open a document in its associated program, click on the **Open** button on the right side of the screen.

To print a document

- To print a document, click on the **Print** button located at the top-left corner of the screen.

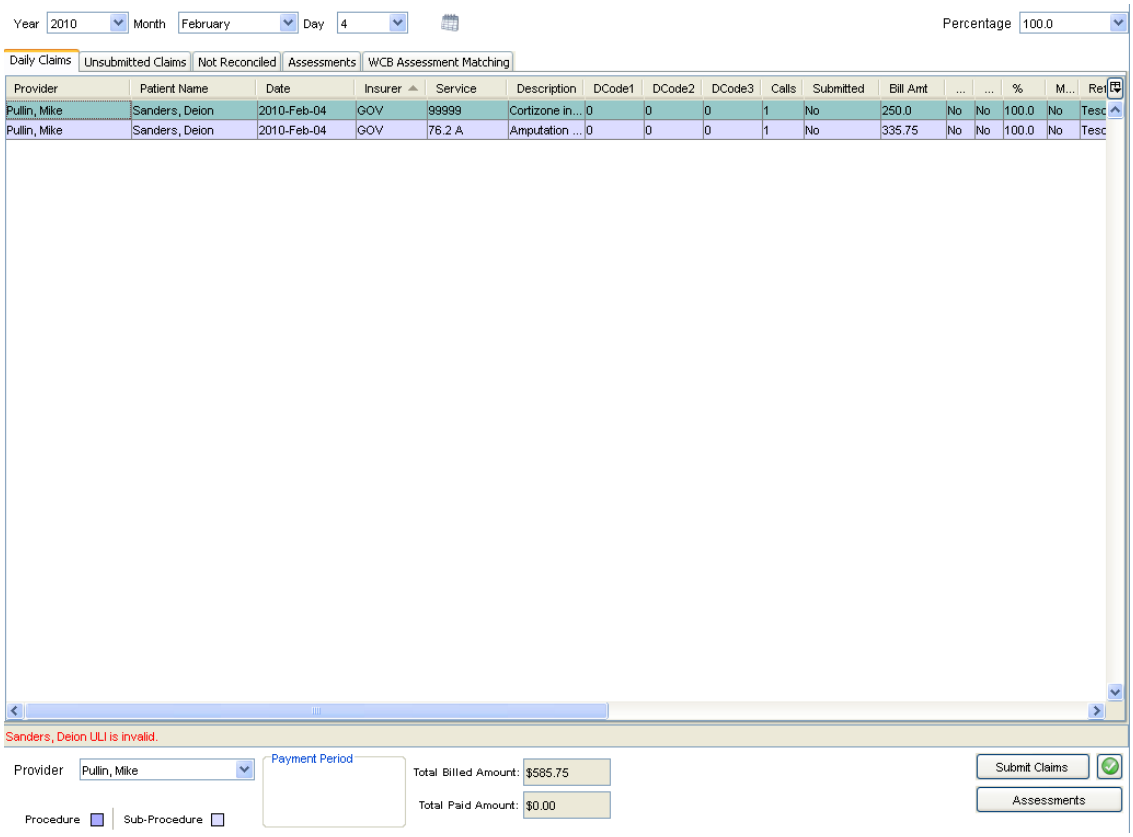
To delete a document

- To delete a document, click the **Delete** button located at the bottom-left of the screen.

CLAIMS AND BILLING - ALBERTA

Daily Claims

The **Daily Claims** tab shows ALL claims for the date and the provider selected. This includes both submitted and unsubmitted claims, claims made from appointments and walk-in claims, GOV, WCB, and private insurer claims.


Year 2010 Month February Day 4
Percentage 100.0
Daily Claims
Unsubmitted Claims
Not Reconciled
Assessments
WCB Assessment Matching
Provider Patient Name Date Insurer Service Description DCode1 DCode2 DCode3 Calls Submitted Bill Amt ... ... % M... Ref
Pullin, Mike Sanders, Deion 2010-Feb-04 GOV 99999 Cortizone in... 0 0 0 1 No 250.0 No No 100.0 No Tesc
Pullin, Mike Sanders, Deion 2010-Feb-04 GOV 76.2 A Amputation ... 0 0 0 1 No 335.75 No No 100.0 No Tesc
Sanders, Deion ULI is invalid.
Provider Pullin, Mike
Payment Period
Total Billed Amount: $585.75
Total Paid Amount: $0.00
Submit Claims
Assessments
Procedure
Sub-Procedure

Creating a New Bill Without an Appointment

From the **Daily Claims** tab, you can quickly create a new bill without an appointment.

To create a new bill in daily claims

1. Right-click anywhere on the **Daily Claims** tab.
2. Select **New Bill**. This will open a new **Claim Details** Dialogue.

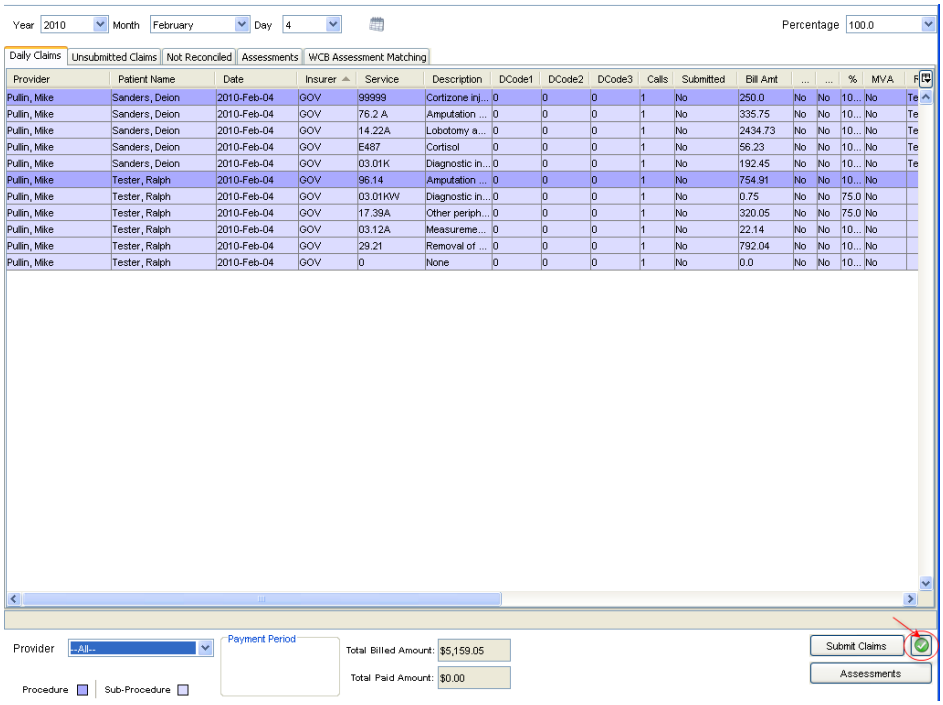
Submitting from Daily Claims

If you submit from the Daily Claims tab, only claims from the selected date will be submitted. This is a good way to keep your submissions small and narrow down problems with WCB claims since a problem with one claim will stop the entire submission.

To validate claims in the Daily Claims tab

1. Select the date you wish to submit claims from.

2. Click the green **Validate Claims** button located at the bottom-right corner. This will show you any problems with claims.


Year 2010
Month February
Day 4
Percentage 100.0
Daily Claims
Unsubmitted Claims
Not Reconciled
Assessments
WCB Assessment Matching
Provider
Patient Name
Date
Insurer
Service
Description
DCode1
DCode2
DCode3
Calls
Submitted
Bill Amt
MVA
Pullin, Mike Sanders, Deion 2010-Feb-04 GOV 99999 Cortizone inj... 0 0 0 1 No 250.0 No No 10... No
Pullin, Mike Sanders, Deion 2010-Feb-04 GOV 76.2 A Amputation ... 0 0 0 1 No 335.75 No No 10... No
Pullin, Mike Sanders, Deion 2010-Feb-04 GOV 14.22A Lobotomy a... 0 0 0 1 No 2434.73 No No 10... No
Pullin, Mike Sanders, Deion 2010-Feb-04 GOV E487 Cortisol 0 0 0 1 No 56.23 No No 10... No
Pullin, Mike Sanders, Deion 2010-Feb-04 GOV 03.01K Diagnostic in... 0 0 0 1 No 192.45 No No 10... No
Pullin, Mike Tester, Ralph 2010-Feb-04 GOV 96.14 Amputation ... 0 0 0 1 No 754.91 No No 10... No
Pullin, Mike Tester, Ralph 2010-Feb-04 GOV 03.01KW Diagnostic in... 0 0 0 1 No 0.75 No No 75.0 No
Pullin, Mike Tester, Ralph 2010-Feb-04 GOV 17.39A Other periph... 0 0 0 1 No 320.05 No No 75.0 No
Pullin, Mike Tester, Ralph 2010-Feb-04 GOV 03.12A Measureme... 0 0 0 1 No 22.14 No No 10... No
Pullin, Mike Tester, Ralph 2010-Feb-04 GOV 29.21 Removal of ... 0 0 0 1 No 792.04 No No 10... No
Pullin, Mike Tester, Ralph 2010-Feb-04 GOV 0 None 0 0 0 1 No 0.0 No No 10... No
Provider
--All--
Payment Period
Total Billed Amount: $5,159.05
Total Paid Amount: $0.00
Procedure
Sub-Procedure
Submit Claims
Assessments

To submit claims in the Daily Claims tab

1. Select the date you wish to submit claims from.

2. Click the **Submit Claims** button located beside the **Validate Claims** button.

Unsubmitted Claims

The **Unsubmitted Claims** includes all unsubmitted claims from all dates of service for the provider selected. All claims that will be submitted electronically will appear here. Any claims for private insurers will not appear here.

Adding a Sub-Procedure to a Claim

You can quickly add a sub-procedure to a claim in the **Unsubmitted Claims** tab.

To add a sub-procedure to a claim

1. Point to a claim.

2. Right-click and select **New Procedure**. This will add a new procedure underneath the selected claim.

Submitting from Unsubmitted Claims

A submission from **Unsubmitted Claims** will include all claims that have not yet been submitted up to the current date.

To validate from Unsubmitted Claims

➢ Click the green **Validate Claims** button located at the bottom-right corner.

To Submit

- Click the **Submit Claims** button.

Not Reconciled

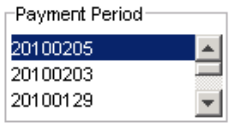
The **Not Reconciled** tab includes any claims that have been submitted and that have not been paid for the amount billed. This will include any overpayments, underpayments, rejections, and reversals.

There are several options for which assessments are displayed.

Show Overpayments – Overpayments will be included in the shown assessments

Show Refusals – Refusals will be included in the shown assessments

Show Selected Assessment – Only assessments from the selected **Payment Period** below will be shown



Show All Assessments – All assessments will be shown

You can also filter assessments by **Explanatory Code(s)**.

Submitting from Not Reconciled

Assessments that have been marked for resubmission can be submitted from the **Not Reconciled** tab. Only the assessments which you currently have displayed will be submitted.

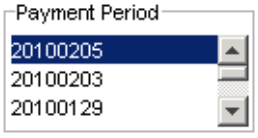
To submit claims from Not Reconciled

1. Choose a payment period and filter your claims how you desire.
2. Click the **Submit Claims** button located at the bottom-right corner.

Assessments

The **Assessments** tab is a record of all claims that come back in the assessment. No work is done in the **Assessments** tab, it is only for reference.

Assessments can be filtered by **Provider** and by **Payment Period**.



Picking up Assessments

To pick up assessments

- Click the **Assessments** button located at the bottom-right corner.

WCB Assessment Matching

The **WCB Assessment Matching** tab is used to match any WCB assessments with the corresponding claims that Accuro is not able to automatically match.

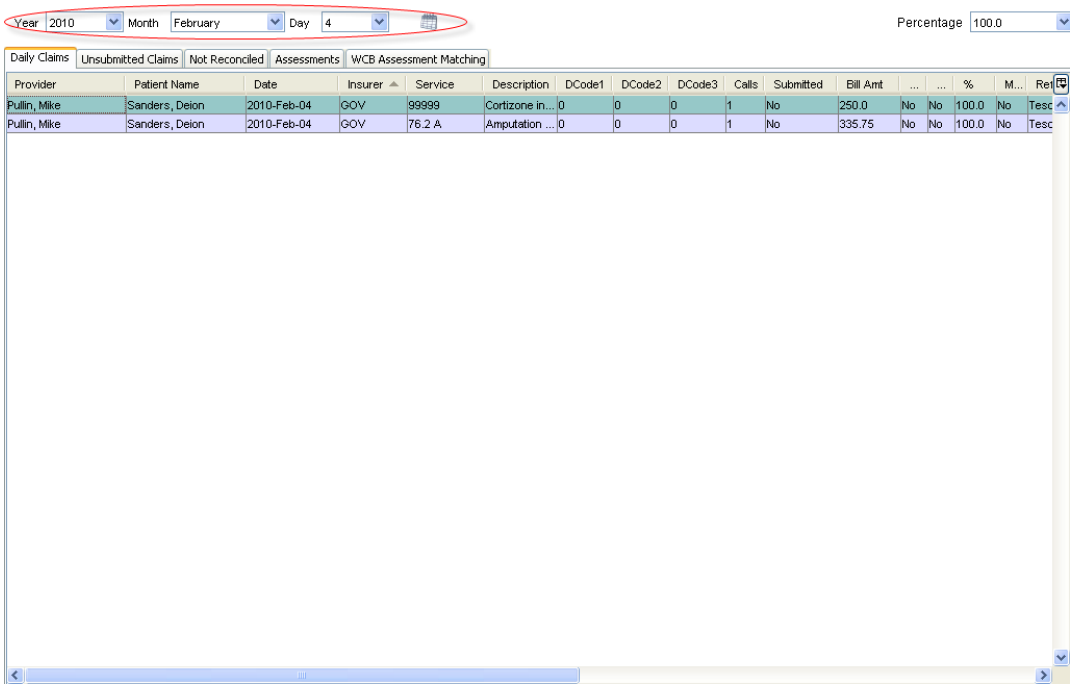
Matching an Assessment

To match an assessment

1. Click on an **Unmatched Record** to select it.
2. Use the **Search Tool** to select a patient.
3. Select a **Possible Match** from the list.
4. Click the **Match** button.

Functions Common to all Tabs

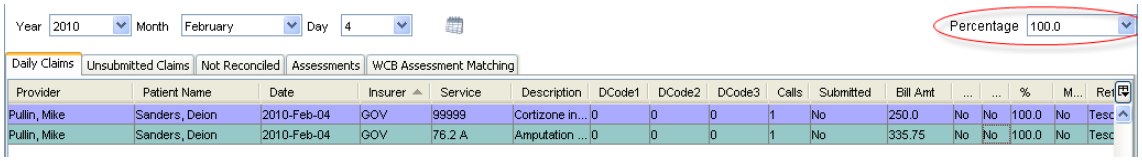
Changing the Date



To change the current date

- Select the **Year**, **Month**, and **Day** that you wish to navigate to from the drop-down lists in the top-left corner.
- Alternatively, you can choose the date from the mini calendar by clicking on the calendar icon.

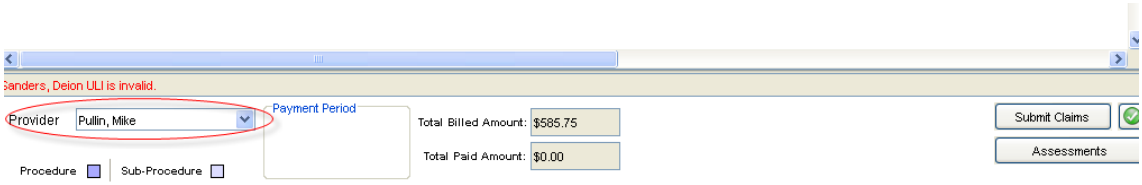
Changing the Claim Percentage



To change the claim percentage

1. Click on a claim to select it.
2. Select the appropriate value from the **Percentage** drop-down list.
   - The default value is 100%.

Changing the Provider



To change the provider

- Select a provider from the drop-down list located at the bottom-left corner.

Viewing Claim Details

To view the details for a claim

1. Point to the claim.
2. Right-click and select **Claim Details**.

Viewing the WCB Form for a Claim

To view the WCB form for a claim

1. Point to the claim.
2. Right-click and navigate to **Insurer Details**.
3. Select **WCB** (the insurer must be WCB).

Viewing a Claim's History

To view a claim's history

1. Point to the claim.
2. Right-click and select **Claim History**.

Viewing a Claim's Patient Demographic Data

You can quickly view the patient demographic data for a claim by selecting **Person Segment**.

To view a claim's patient demographics

1. Point to the claim.
2. Right-click and select **Person Segment**.

Viewing or Changing a Claim's Referring Provider

You can quickly view or change the referring provider for a claim.

To view or change a claim's referring provider

1. Point to the claim.
2. Right-click and select **Referred By**.

Applying a Macro to a Claim

You can apply a macro to a claim from the **Claims** section.

To apply a macro to a claim

1. Point to the claim.
2. Right-click and select **Apply Macro**.

Copying a Pre-Existing Claim

You can re-use the details of an existing claim to create a new claim.

To copy a claim

1. Point to a claim.
2. Right-click and select **Copy Claim**.

Deleting a Procedure

You can delete procedures that were not created from an appointment. To delete procedures created from an appointment, you must first cancel the appointment.

To refund a claim

1. Point to a claim.
2. Right-click and select **Debit Bill**.

Marking a Claim for Resubmission

Any claims that are returned to **Not Reconciled** may be adjusted and then marked for resubmission.

To mark a claim for resubmission

1. Point to a claim you wish to mark for resubmission.
2. Right-click and select **Resubmit**.

- You can also choose **Resubmit All** if you would like to mark all the claims for resubmission.

Debiting a Claim

Claims that were accidentally billed to Alberta Health Care can be refunded by using **Debit Bill**.

Refunding a claim

1. Point to a claim.
2. Right-click and select **Debit Bill**.

Resubmitting a WCB Claim for Reassessment

To resubmit a WCB claim for reassessment

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **ReSubmit WCB Bill for ReAssess**.
    - To resubmit all WCB claims for reassessment, select **ReSubmit All WCB for ReAssess**.

Using a Claim Number when Submitting

Occasionally more than one claim number will become associated with a claim if it has been submitted more than once. Alberta Health Care may ask you to submit using the original claim number, or a particular claim number.

To select a claim number for a claim

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **Use Claim Number**.

Overriding GST

You can change the percentage that is charged for GST on a claim.

To override GST

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **Override GST**.
4. Enter the amount you wish to bill for.

Setting the Facility for a Claim

You can quickly change the facility for a claim.

To change the facility for a claim

1. Point to the claim.

2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **Set Facility**.
4. Select a facility from the drop-down list.
5. Click **OK**.

Marking a Claim as Invoiced

To mark a claim as invoiced

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **Mark as Invoiced**.
4. Select an invoice date from the pop-up mini calendar.

Setting a Claim to No Charge, NO SHOW, Adjust-to-Paid, Write-Off

No Charge is used for anything that was billed incorrectly or for a service the provider does not wish to charge for.

No Show is used when a patient does not show for their appointment.

Adjust-to-Paid is used for any overpayments or underpayments. It assumes the amount paid is correct and adjusts the billed amount to the paid amount. Use this cautiously as only development can remove it if applied incorrectly.

Claims that should have been paid but will not be paid may be set as a **Write-Off**. A **Write-Off Report** can be submitted for tax purposes at year end.

To set a claim to No Charge, No Show, Adjust-to-Paid, Write-off

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select one of **No Charge**, **No Show**, **Adjust-to-Paid**, or **Write-off**.

Marking a Claim as Motor Vehicle Accident (MVA)

If a claim is related to a Motor Vehicle Accident, it should be marked as **MVA** before submitting to Alberta Health Care.

To mark a claim as MVA

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **MVA**.

Viewing a Claim's Invoice (Private Insurers)

For claims that are billed to private insurers, there will be an associated **Invoice**.

To view a claim's invoice

1. Point to a claim.
2. Right-click and select **Invoice**.
    - If the claim does not have a private insurer, this option will be disabled.

Viewing a Claim's Associated Appointment

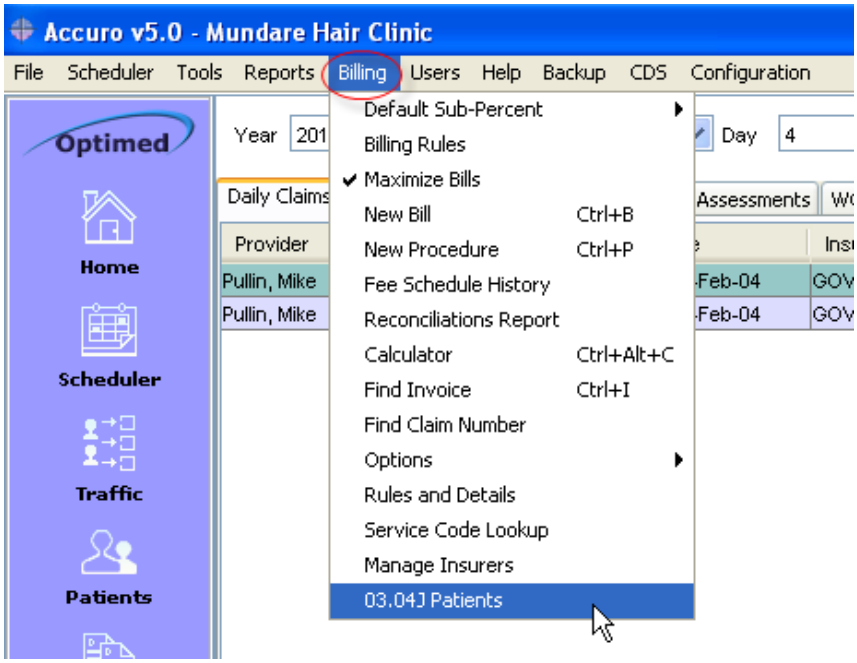
If a claim was made from an appointment in the Scheduler, you can quickly view that appointment.

To view a claim's appointment

1. Point to a claim.
2. Right-click and select **Go To Appointment**.
    - If the claim was not created from an appointment, this option will be disabled.

The Billing Menu

On the main menu bar, there is a **Billing** menu.



Billing Menu Items

Default Sub-Percentage – Change the default percentage that sub-procedures are billed at

Billing Rules – Create, edit, and remove billing rules

Maximize Bills – When adding sub-procedures to a bill, put the most expensive procedure as the main procedure (always billed at 100%)

New Bill – Open a blank claim details Dialogue to create a new bill

New Procedure – Add a sub-procedure to a selected bill

Fee Schedule History – Show a history of fee codes and when they were updated

Reconciliations Report – Generate a Billing Summary based on a provider's Business Arrangement number and a payment date

Calculator – Open a calculator feature

Find Invoice – Find an invoice based on an invoice number

Find Claim Number – Find an invoice based on a claim number

Options –

Manage Procedures – Create and edit Procedure Codes

Manage Procedure Categories – Create, edit, and delete Procedure Code Categories

Service Code Accounts – Create, edit, and delete Service Code Accounts

Rules and Details – A list of Explanatory Codes, Fee Modifiers, and Governing Rules as provided by the Alberta Health and Wellness Schedule of Benefits

Service Code Lookup – Search for a service code on either code or keyword

Manage Insurers – Create, edit, and delete private insurers

03.04 J Patients --

Claim Details

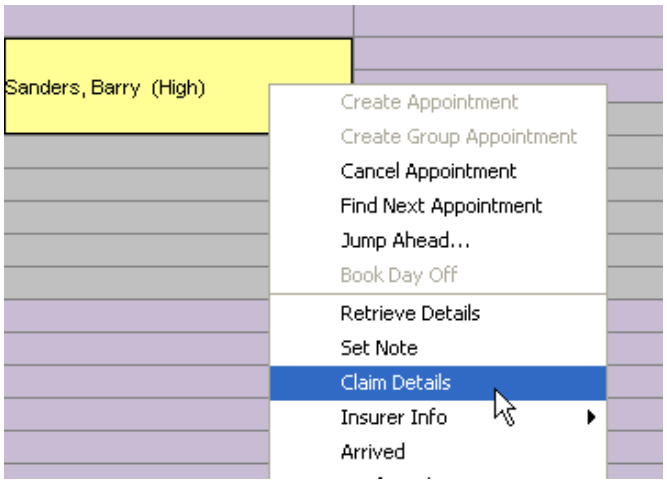
The **Claim Details** Dialogue is used to enter information for a claim. You can create new claims or edit existing ones.

Opening the Claim Details Dialogue

There are several ways to open the **Claim Details** Dialogue.

To open claim details from an appointment in the scheduler

1. Point to the appointment in the **Scheduler**.
2. Right-click and select **Claim Details**.



To open claim details for an existing claim in the claims section

- Double-click on an existing claim.
- Right-click on an existing claim and select **Claim Details**.

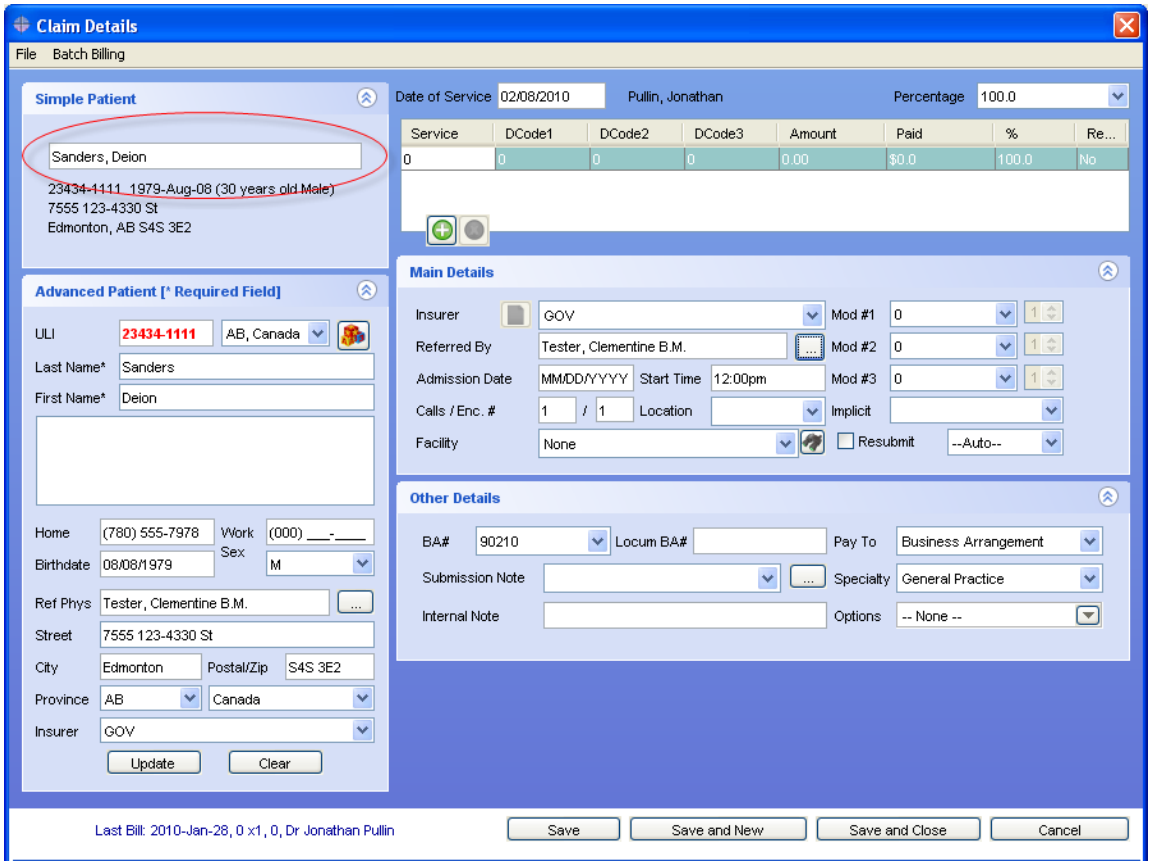
To open claim details for a new claim under daily claims

1. Right-click anywhere on the daily claims tab.
2. Select **New Bill**.

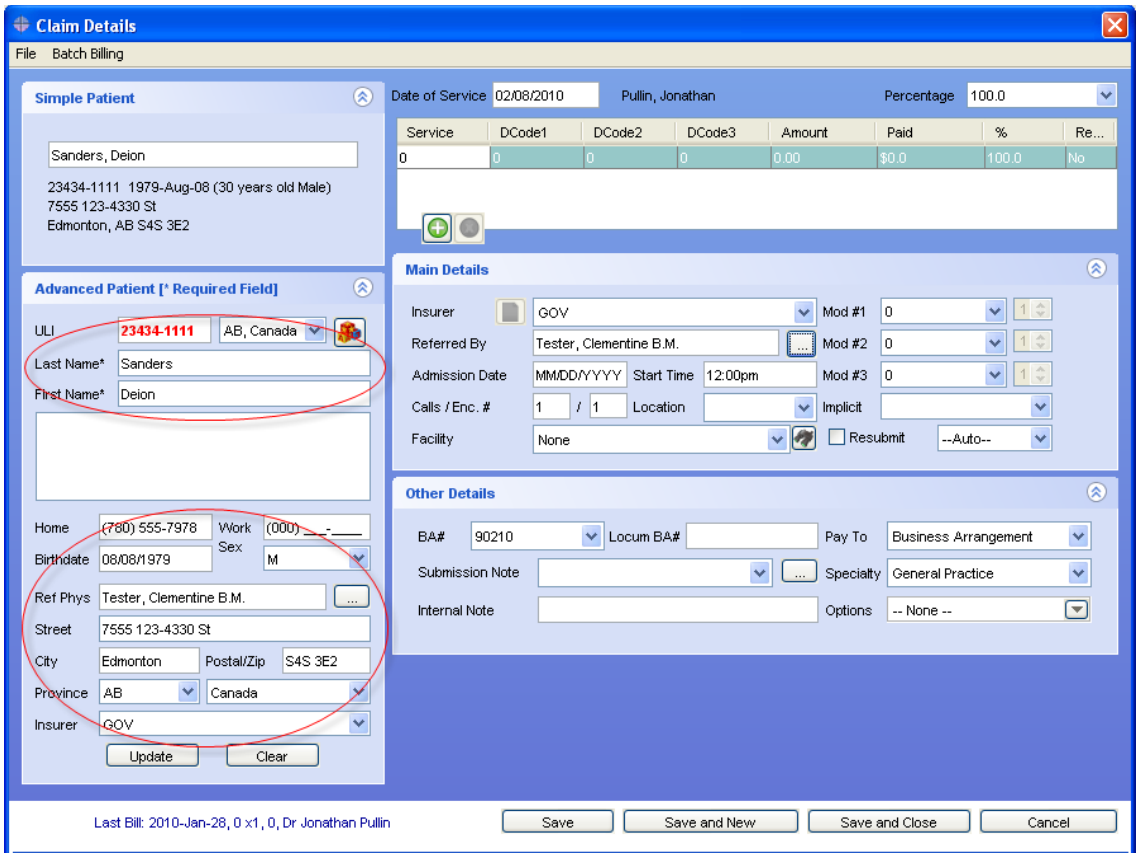
Filling out Claim Details

To fill out the claim details Dialogue

1. If a claim has been opened from an appointment, the patient will already be loaded. If you are creating a new bill from **Daily Claims**, you will need to load a patient using the **Search Tool**.



2. Ensure the patient details are correct in the **Advanced Patient** section.



3. Ensure the **Date of Service** is correct.

4. Add a procedure and any necessary sub-procedures for the claim.

To add a procedure

1. Double-click in the space under **Service** to highlight it.

2. Type in either a procedure code, or a keyword which can be searched on in the procedure code's description.

   - You can also right-click in the space under **Service** and select **Search Service Code**. This will open a **Service Code** search Dialogue.

3. Select the procedure from the drop-down list.

4. Double-click on the space under **DCode1** to highlight it.

5. Type in either a diagnostic code, or a keyword which can be searched on in the diagnostic code's description.

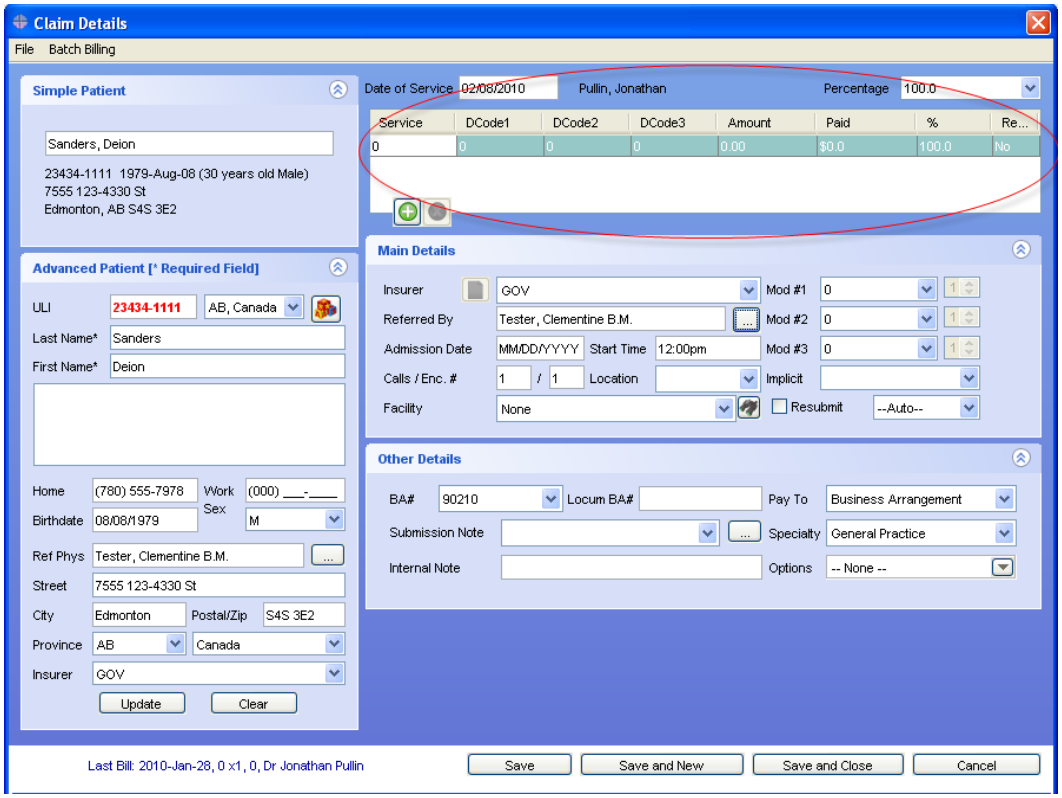
   - You can also right-click in the space under **Service** and select **Search Diagnostic Code1**. This will open a **Diagnostic Code** search Dialogue.

   - Repeat this if necessary for **DCode2** and **DCode3**.

To add a sub-procedure

1. Click the **Add** button to create a new procedure line.

2. Follow the steps for adding a procedure above.



3. Fill out the **Main Details**.

    1. Select an **Insurer** from the drop-down list if it is different from the default insurer.

    2. Select or change the **Referred By** provider if required.

    3. Select an **Admission Date** and **Start Time** if required (for hospital billing).

    4. Enter the number of **Calls** and **Encounters** if required.

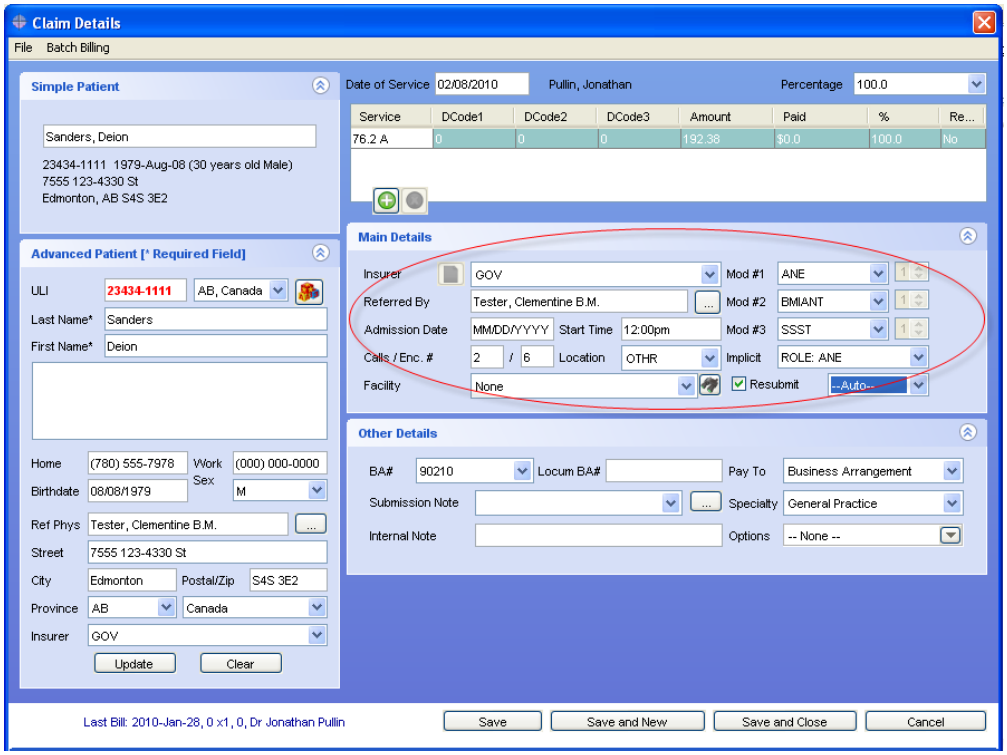
    5. Select a **Location** from the drop-down list if required.

    6. Select a different **Facility** from the drop-down list if required.

    7. Select up to three **Modifiers** from the drop-down lists if required.

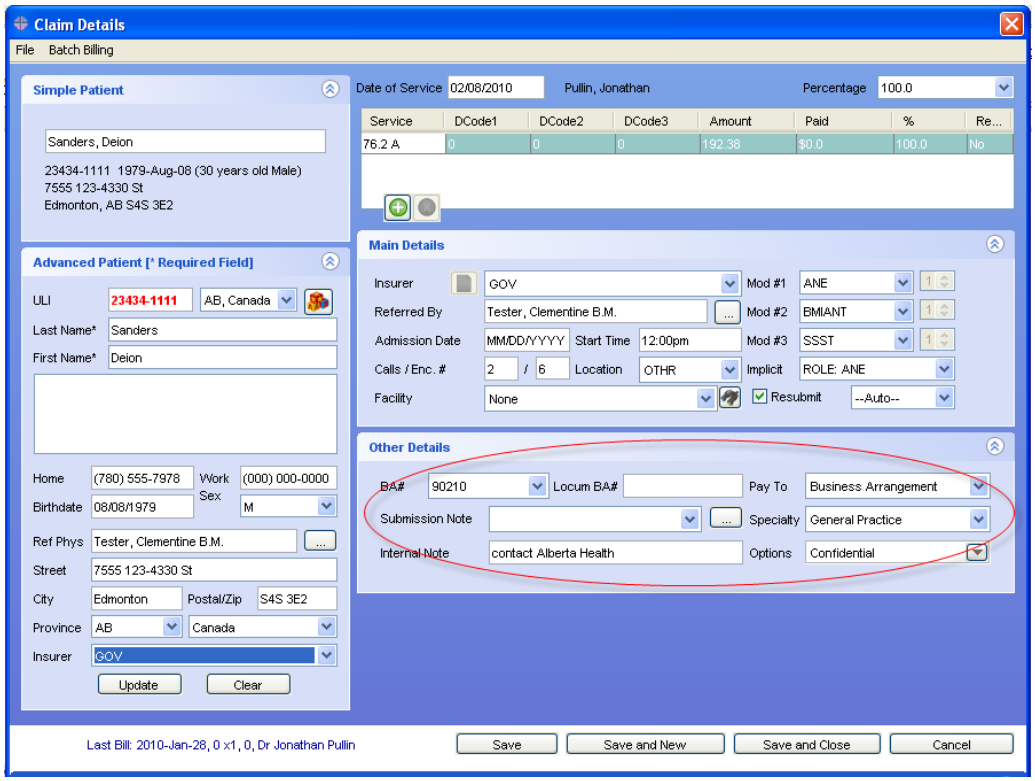
    8. Select an **Implicit Modifier** from the drop-down list if required.

    9. If resubmitting, click the checkbox beside **Resubmit** and select a resubmit modifier option from the drop-down list.



4. Fill out the **Other Details** as required.

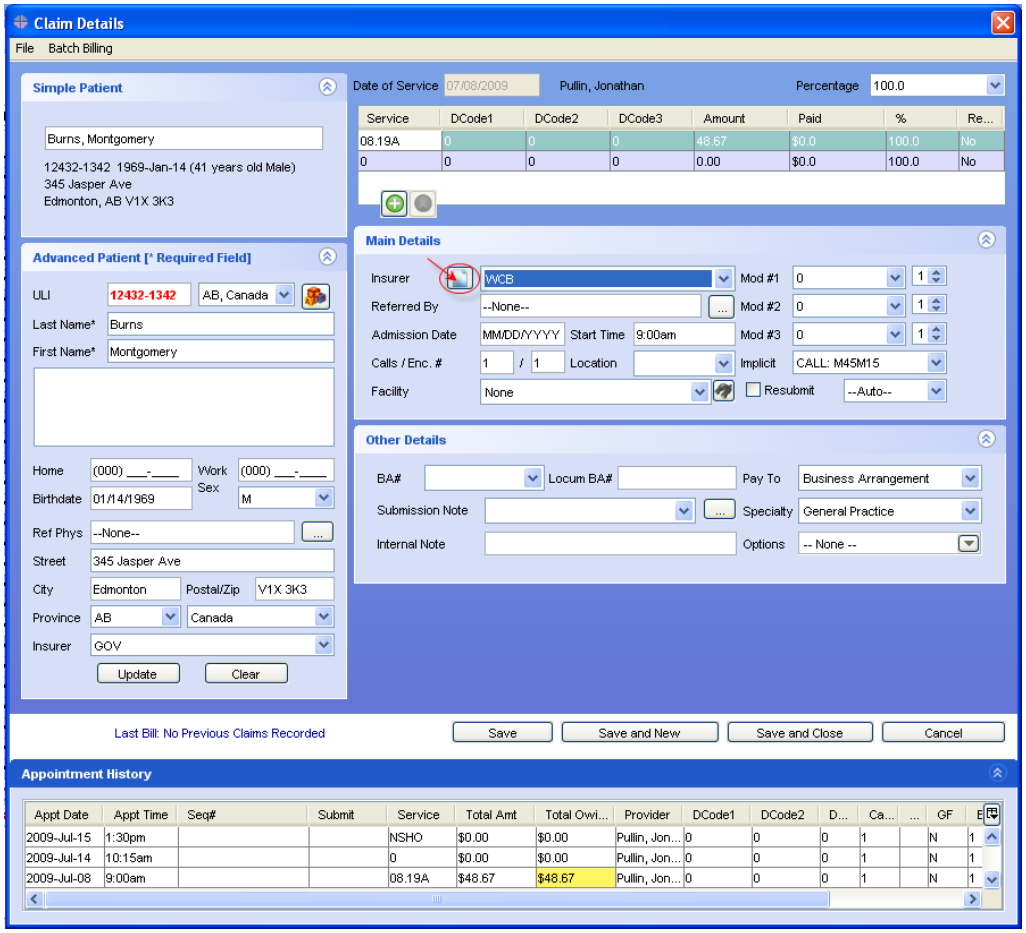
    1. Select the provider **BA Number** if different from the default.
    2. Select a **Pay To** if different from the default.
    3. Select a **Submission Note** macro if required.
    4. Select a **Specialty** if different from the default.
    5. Type any additional information into the **Internal Note** field.
    6. Select an **Option** from the drop-down list if desired.



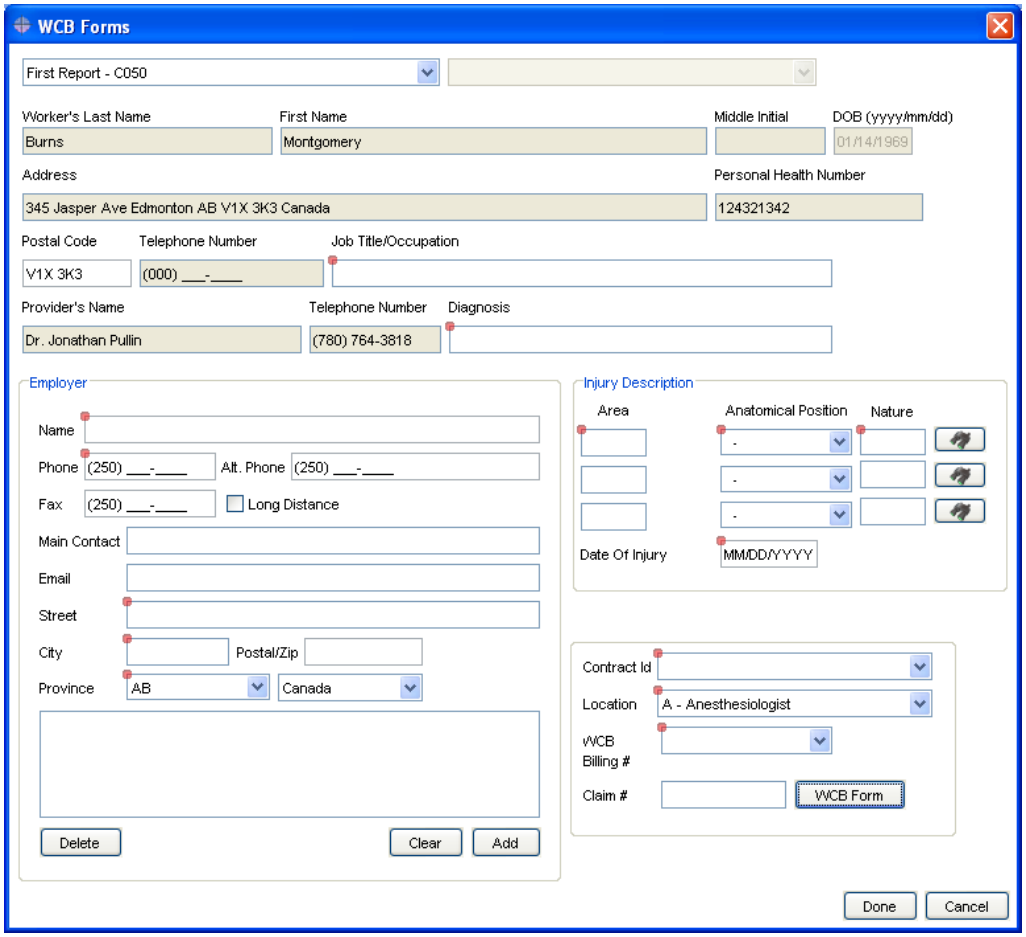
5. Click **Save**, **Save and New**, or **Save and Close** to save the claim.

Filling out WCB Claims

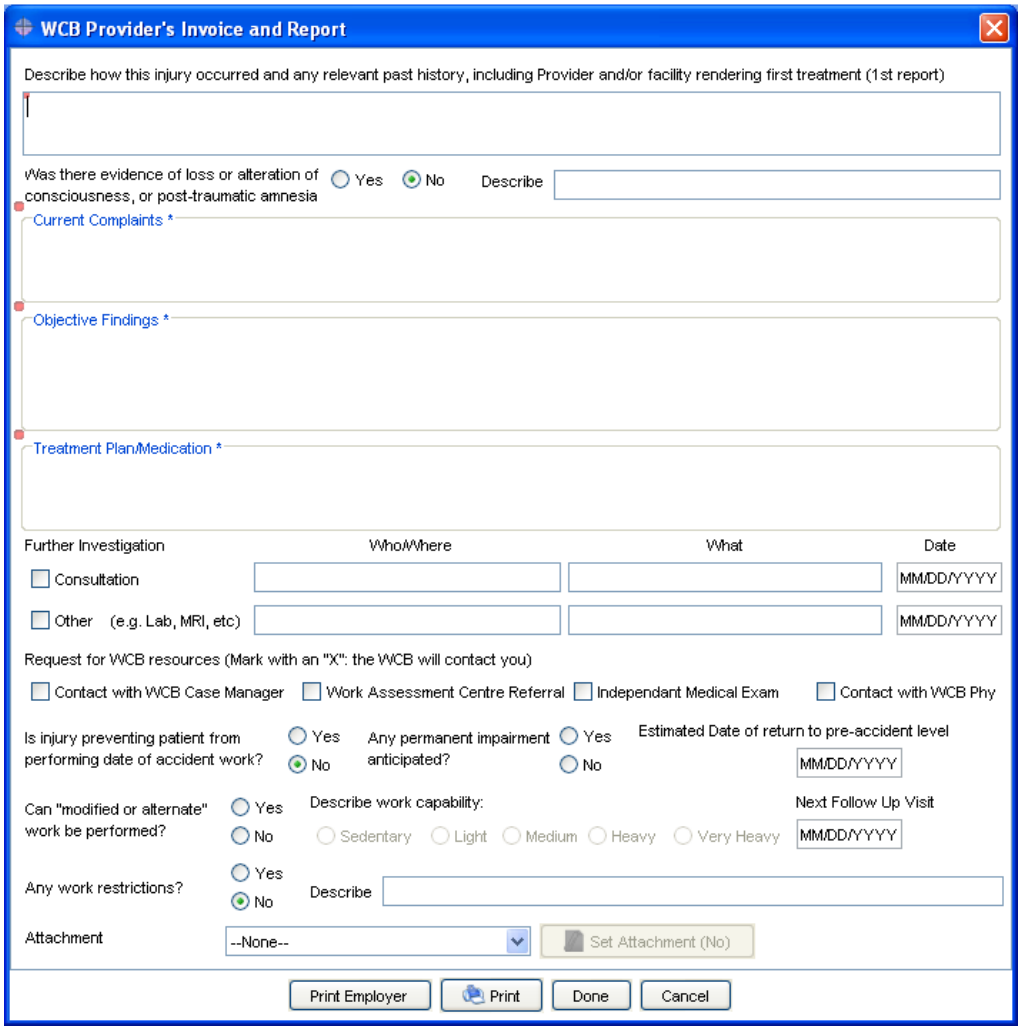
If the insurer is WCB, you may have to fill out the WCB form. You can open this form by clicking the button beside **Insurer** on the **Claim Details** Dialogue.



On the **WCB Form**, all fields with a red dot are required and must be filled in.



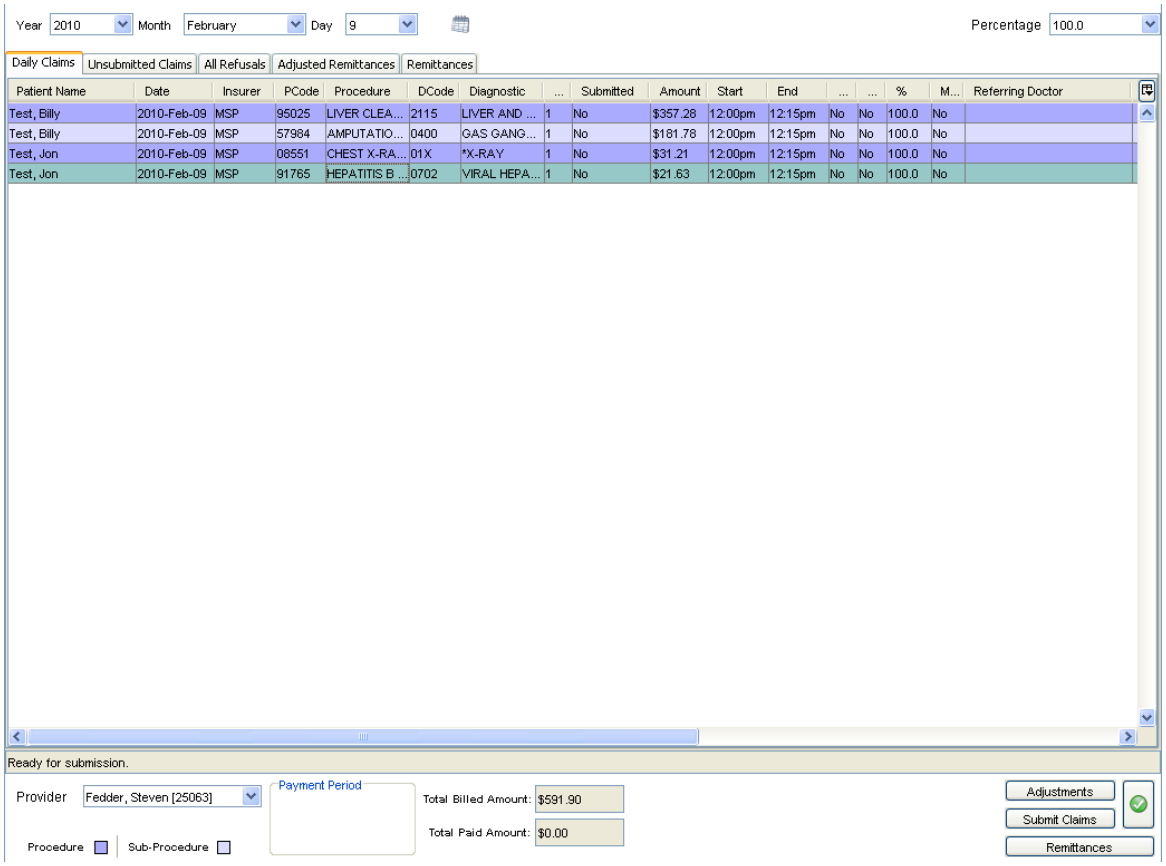
Click the **WCB Form** button to open the **WCB Provider's Invoice and Report** Dialogue. All fields with red dots must also be filled out on this form.


WCB Provider's Invoice and Report
Describe how this injury occurred and any relevant past history, including Provider and/or facility rendering first treatment (1st report)
Was there evidence of loss or alteration of consciousness, or post-traumatic amnesia
Yes
No
Describe
Current Complaints *
Objective Findings *
Treatment Plan/Medication *
Further Investigation
Who/Where
What
Date
Consultation
MM/DD/YYYY
Other (e.g. Lab, MRI, etc)
MM/DD/YYYY
Request for WCB resources (Mark with an "X": the WCB will contact you)
Contact with WCB Case Manager
Work Assessment Centre Referral
Independant Medical Exam
Contact with WCB Phy
Is injury preventing patient from performing date of accident work?
Yes
No
Any permanent impairment anticipated?
Yes
No
Estimated Date of return to pre-accident level
MM/DD/YYYY
Can "modified or alternate" work be performed?
Yes
No
Describe work capability:
Sedentary
Light
Medium
Heavy
Very Heavy
Next Follow Up Visit
MM/DD/YYYY
Any work restrictions?
Yes
No
Describe
Attachment
--None--
Set Attachment (No)
Print Employer
Print
Done
Cancel

CLAIMS AND BILLING - BRITISH COLUMBIA

Daily Claims

The **Daily Claims** tab shows ALL claims for the date and the provider selected. This includes both submitted and unsubmitted claims, claims made from appointments and walk-in claims, ICBC, MSP, WCB, and private insurer claims.


Year 2010 Month February Day 9
Percentage 100.0
Daily Claims
Unsubmitted Claims
All Refusals
Adjusted Remittances
Remittances
Patient Name | Date | Insurer | PCode | Procedure | DCode | Diagnostic | ... | Submitted | Amount | Start | End | ... | ... | % | M... | Referring Doctor
Test, Billy | 2010-Feb-09 | MSP | 95025 | LIVER CLEA... | 2115 | LIVER AND ... | 1 | No | $357.28 | 12:00pm | 12:15pm | No | No | 100.0 | No
Test, Billy | 2010-Feb-09 | MSP | 57984 | AMPUTATIO... | 0400 | GAS GANG... | 1 | No | $181.78 | 12:00pm | 12:15pm | No | No | 100.0 | No
Test, Jon | 2010-Feb-09 | MSP | 08551 | CHEST X-RA... | 01X | *X-RAY | 1 | No | $31.21 | 12:00pm | 12:15pm | No | No | 100.0 | No
Test, Jon | 2010-Feb-09 | MSP | 91765 | HEPATITIS B ... | 0702 | VIRAL HEPA... | 1 | No | $21.63 | 12:00pm | 12:15pm | No | No | 100.0 | No
Ready for submission.
Provider Fedder, Steven [25063]
Payment Period
Total Billed Amount: $591.90
Total Paid Amount: $0.00
Procedure
Sub-Procedure
Adjustments
Submit Claims
Remittances

Creating a New Bill Without an Appointment

From the **Daily Claims** tab, you can quickly create a new bill without an appointment.

To create a new bill in daily claims

1. Right-click anywhere on the **Daily Claims** tab.

2. Select **New Bill**. This will open a new **Claim Details** Dialogue.

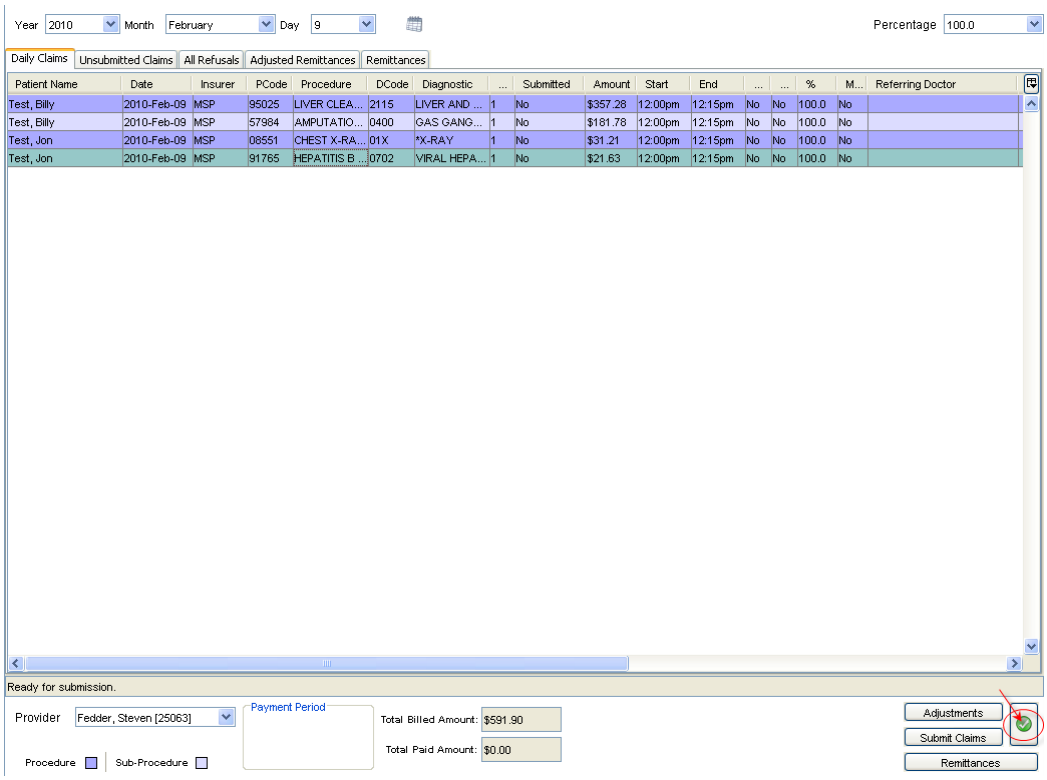
Submitting from Daily Claims

If you submit from the **Daily Claims** tab, only claims from the selected date will be submitted. This is a good way to keep your submissions small and narrow down problems with WCB claims since a problem with one claim will stop the entire submission.

To validate claims in the Daily Claims tab

1. Select the date you wish to submit claims from.

2. Click the green **Validate Claims** button located at the bottom-right corner. This will show you any problems with claims.



To submit claims in the Daily Claims tab

1. Select the date you wish to submit claims from.

2. Click the **Submit Claims** button located beside the **Validate Claims** button.

Unsubmitted Claims

The **Unsubmitted Claims** includes all unsubmitted claims from all dates of service for the provider selected. All claims that will be submitted electronically will appear here. Any claims for private insurers will not appear here.

Adding a Sub-Procedure to a Claim

You can quickly add a sub-procedure to a claim in the **Unsubmitted Claims** tab.

To add a sub-procedure to a claim

1. Point to a claim.

2. Right-click and select **New Procedure**. This will add a new procedure underneath the selected claim.

Submitting from Unsubmitted Claims

A submission from **Unsubmitted Claims** will include all claims that have not yet been submitted up to the current date.

To validate from Unsubmitted Claims

- Click the green **Validate Claims** button located at the bottom-right corner.

To submit

- Click the **Submit Claims** button.

All Refusals

The **All Refusals** tab includes any claims that have been submitted and that have been refused. Refused claims can be filtered by provider.

Submitting from all Refusals

Refused claims that have been marked for resubmission can be submitted from the **All Refusals** tab. Only the claims which you currently have displayed will be submitted.

To submit claims from All Refusals

1. Choose a provider to filter claims on, or select **-All-** from the drop-down list.
2. Click the **Submit Claims** button located at the bottom-right corner.

Adjusted Remittances

The **Adjusted Remittances** tab shows all remittances that have been paid differently than they were billed. You can choose to **Write Off**, **Adjust to Paid**, or **Debit** adjusted remittances, or you can adjust a claim and mark it for resubmission.

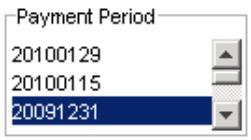
To resubmit claims from Adjusted Remittances

1. Point to a claim you wish to mark for resubmission.
2. Right-click and select **Resubmit**.
    - You can also choose **Resubmit All** if you would like to mark all the claims for resubmission.
3. Click the **Submit Claims** button located at the bottom-right.

Remittances

The **Remittances** tab is a record of all claims that come back in the assessment. No work is done in the **Remittances** tab, it is only for reference.

Assessments can be filtered by **Provider** and by **Payment Period**.



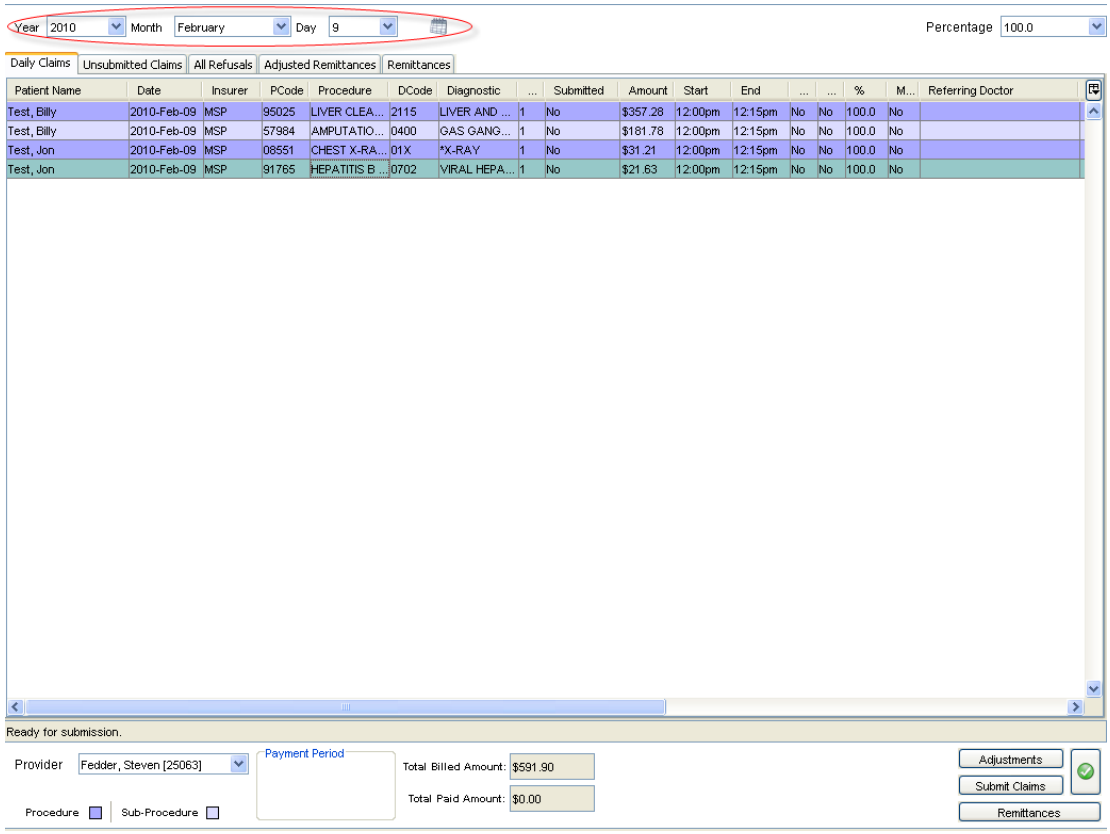
Picking up Remittances

To pick up remittances

- Click the **Remittances** button located at the bottom-right corner.

Functions Common to all Tabs

Changing the Date

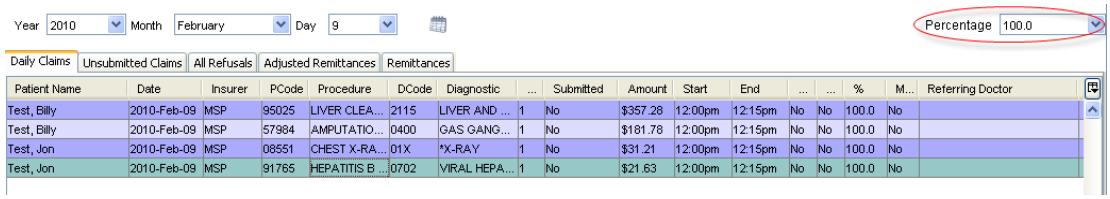


To change the current date

- Select the **Year**, **Month**, and **Day** that you wish to navigate to from the drop-down lists in the top-left corner.

- Alternatively, you can choose the date from the mini calendar by clicking on the calendar icon.

Changing the Claim Percentage


Year 2010
Month February
Day 9
Percentage 100.0
Daily Claims
Unsubmitted Claims
All Refusals
Adjusted Remittances
Remittances
Patient Name
Date
Insurer
PCode
Procedure
DCode
Diagnostic
Submitted
Amount
Start
End
%
M...
Referring Doctor
Test, Billy 2010-Feb-09 MSP 95025 LIVER CLEA... 2115 LIVER AND ... 1 No $357.28 12:00pm 12:15pm No No 100.0 No
Test, Billy 2010-Feb-09 MSP 57984 AMPUTATIO... 0400 GAS GANG... 1 No $181.78 12:00pm 12:15pm No No 100.0 No
Test, Jon 2010-Feb-09 MSP 08551 CHEST X-RA... 01X *X-RAY 1 No $31.21 12:00pm 12:15pm No No 100.0 No
Test, Jon 2010-Feb-09 MSP 91765 HEPATITIS B ... 0702 VIRAL HEPA... 1 No $21.63 12:00pm 12:15pm No No 100.0 No

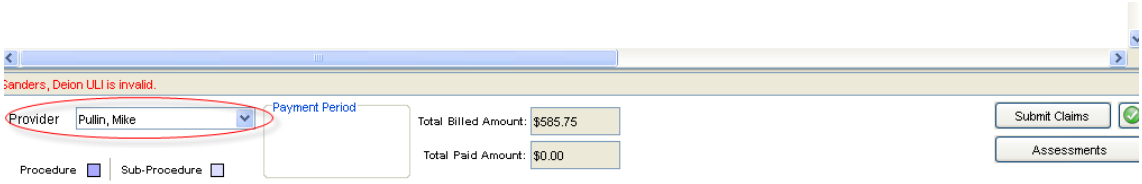
To change the claim percentage

1. Click on a claim to select it.

2. Select the appropriate value from the **Percentage** drop-down list.

- The default value is 100%.

Changing the Provider



To change the provider

- Select a provider from the drop-down list located at the bottom-left corner.

Viewing Claim Details

To view the details for a claim

1. Point to the claim.
2. Right-click and select **Claim Details**.

Viewing the WCB Form for a Claim

To view the WCB form for a claim

1. Point to the claim.
2. Right-click and navigate to **Insurer Details**.
3. Select **WCB** (the insurer must be WCB).

Viewing a Claim's History

To view a claim's history

1. Point to the claim.
2. Right-click and select **Claim History**.

Applying a Macro to a Claim

You can apply a macro to a claim from the **Claims** section.

To apply a macro to a claim

1. Point to the claim.
2. Right-click and select **Apply Macro**.

Copying a Pre-Existing Claim

You can re-use the details of an existing claim to create a new claim.

To copy a claim

1. Point to a claim.

2. Right-click and select **Copy Claim**.

Deleting a Procedure

You can delete procedures that were not created from an appointment. To delete procedures created from an appointment, you must first cancel the appointment.

To delete a procedure

1. Point to a claim.
2. Right-click and select **Delete Procedure**.

Marking a claim for Resubmission

Any claims that are returned to **All Refusals** or **Adjusted Remittances** may be adjusted and then marked for resubmission.

To mark a claim for resubmission

1. Point to a claim you wish to mark for resubmission.
2. Right-click and select **Resubmit**.
    - You can also choose **Resubmit All** if you would like to mark all the claims for resubmission.

Debiting a Bill

Claims that were billed incorrectly can be refunded by using **Debit Bill**.

To refund a claim

1. Point to a claim.
2. Right-click and select **Debit Bill**.

Overriding GST and PST

You can change the percentage that is charged for GST on a claim.

To override GST or PST

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **Override GST or Override PST**.
4. Enter the percentage amount you wish to bill for.

Setting the Location for a Claim

You can quickly change the location for a claim.

To change the location for a claim

1. Point to the claim.

2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **Set Location**.
4. Select a location from the drop-down list.
5. Click **OK**.

Marking a Claim as Invoiced

To mark a claim as invoiced

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **Mark as Invoiced**.
4. Select an invoice date from the pop-up mini calendar.

Marking a Claim to No Charge, NO SHOW, Adjust-to-Paid, Write-Off

No Charge is used for anything that was billed incorrectly or for a service the provider does not wish to charge for.

No Show is used when a patient does not show for their appointment.

Adjust-to-Paid is used for any overpayments or underpayments. It assumes the amount paid is correct and adjusts the billed amount to the paid amount. Use this cautiously as only development can remove it if applied incorrectly.

Claims that should have been paid but will not be paid may be set as a **Write-Off**. A **Write-Off Report** can be submitted for tax purposes at year end.

To set a claim to No Charge, No Show, Adjust-to-Paid, Write-off

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select one of **No Charge**, **No Show**, **Adjust-to-Paid**, or **Write-off**.

Marking a Claim as Motor Vehicle Accident (MVA)

If a claim is related to a Motor Vehicle Accident, it should be marked as **MVA** before submitting.

To mark a claim as MVA

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **MVA**.

Viewing a Claim's Invoice (Private Insurers)

For claims that are billed to private insurers, there will be an associated **Invoice**.

To view a claim's invoice

1. Point to a claim.
2. Right-click and select **Invoice**.
    - If the claim does not have a private insurer, this option will be disabled.

Viewing a Claim's Associated Appointment

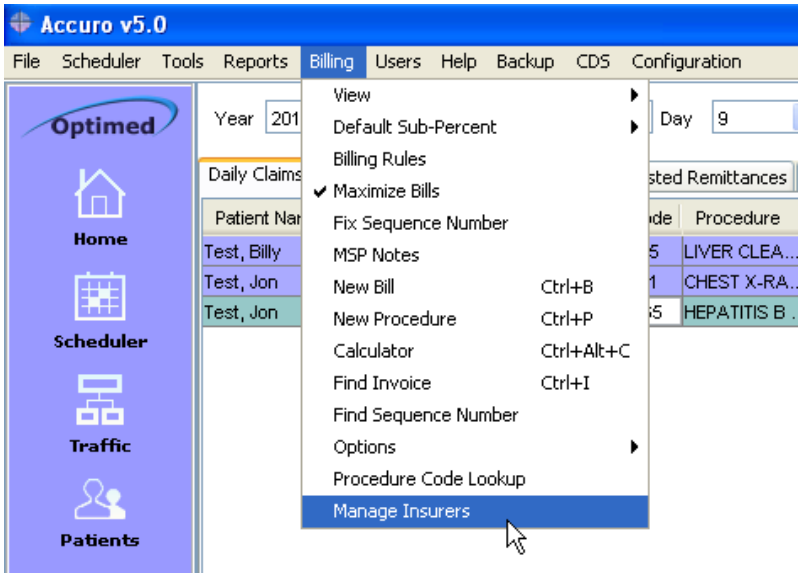
If a claim was made from an appointment in the Scheduler, you can quickly view that appointment.

To view a claim's appointment

1. Point to a claim.
2. Right-click and select navigate to **View**.
3. Select **Go To Appointment**.
    - If the claim was not created from an appointment, this option will be disabled.

The Billing Menu

On the main menu bar, there is a **Billing** menu.



Billing Menu Items

Default Sub-Percentage – Change the default percentage that sub-procedures are billed at

Billing Rules – Create, edit, and remove billing rules

Maximize Bills – When adding sub-procedures to a bill, put the most expensive procedure as the main procedure (always billed at 100%)

Fix Sequence Number – Used when MSP submissions get out of sequence

MSP Notes – View messages sent from MSP

New Bill – Open a blank claim details Dialogue to create a new bill

New Procedure – Add a sub-procedure to a selected bill

Calculator – Open a calculator feature

Find Invoice – Find an invoice based on an invoice number

Find Sequence Number – Find the last sequence number for submitted claims

Options –

Manage Procedures – Create and edit Procedure Codes

Manage Procedure Categories – Create, edit, and delete Procedure Code Categories

Service Code Accounts – Create, edit, and delete Service Code Accounts

Procedure Code Lookup – Search for a procedure code on either code or keyword

Manage Insurers – Create, edit, and delete private insurers

Claim Details

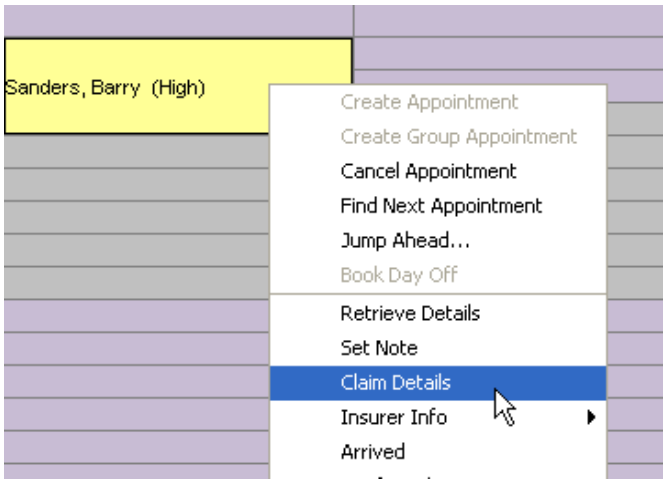
The **Claim Details** Dialogue is used to enter information for a claim. You can create new claims or edit existing ones.

Opening the Claim Details Dialogue

There are several ways to open the **Claim Details** Dialogue.

To open claim details from an appointment in the scheduler

1. Point to the appointment in the **Scheduler**.
2. Right-click and select **Claim Details**.



To open claim details for an existing claim in the claims section

- Double-click on an existing claim.
- Right-click on an existing claim and select **Claim Details**.

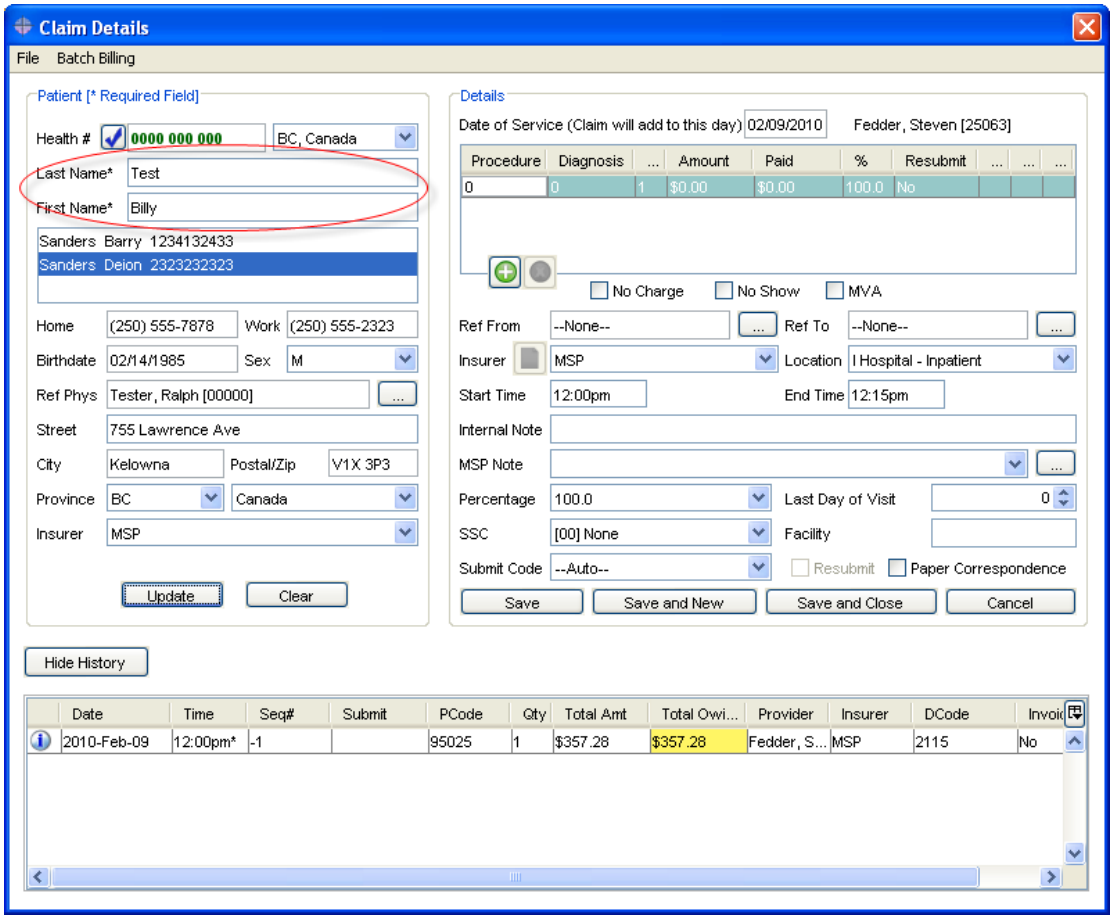
To open claim details for a new claim under daily claims

1. Right-click anywhere on the daily claims tab.
2. Select **New Bill**.

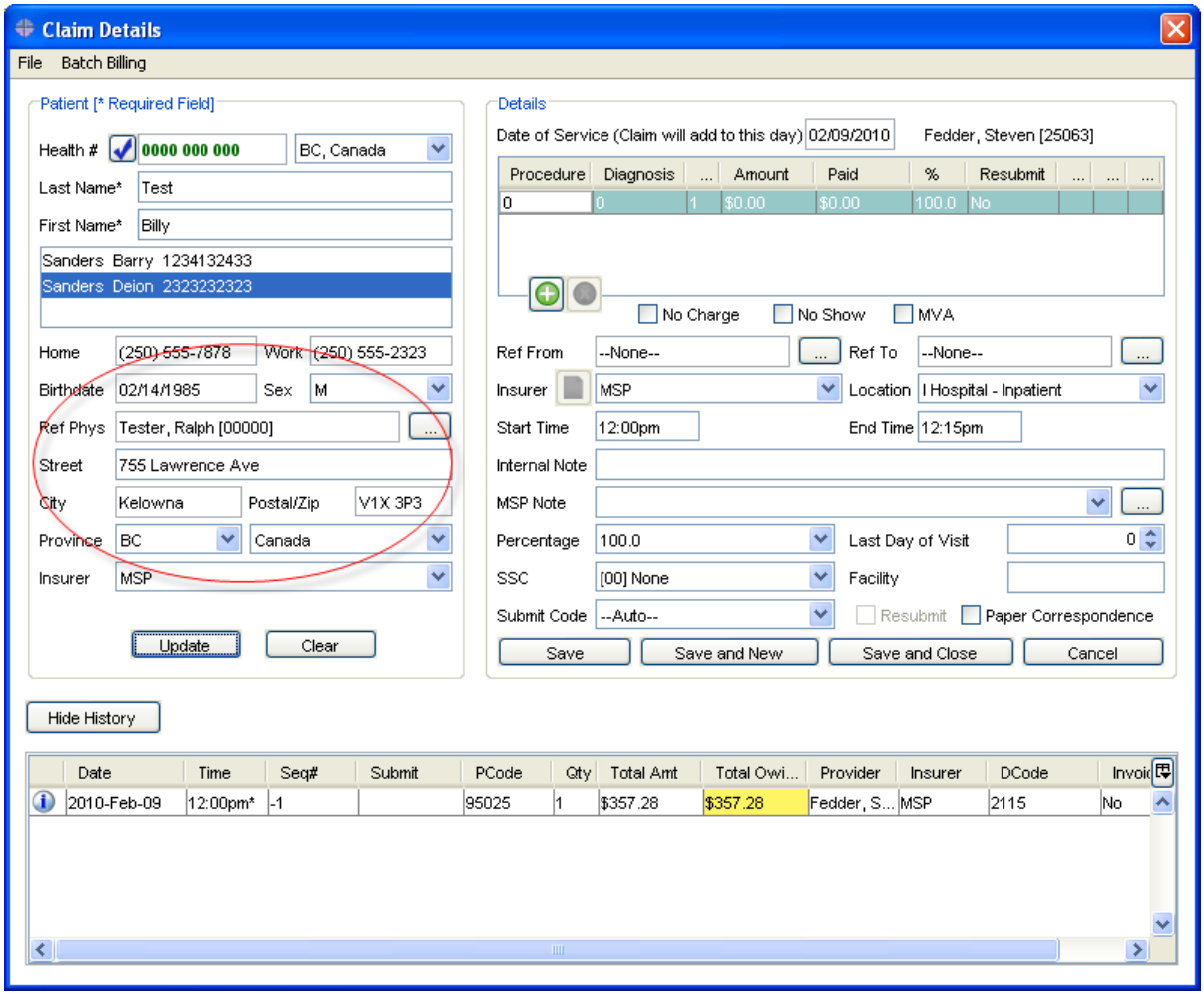
Filling out Claim Details

To Fill out the Claim Details Dialogue

1. If a claim has been opened from an appointment, the patient will already be loaded. If you are creating a new bill from **Daily Claims**, you will need to load a patient using the **Search Tool**.



2. Ensure the patient details are correct.



3. Add a procedure and any necessary sub-procedures for the claim.

To add a procedure

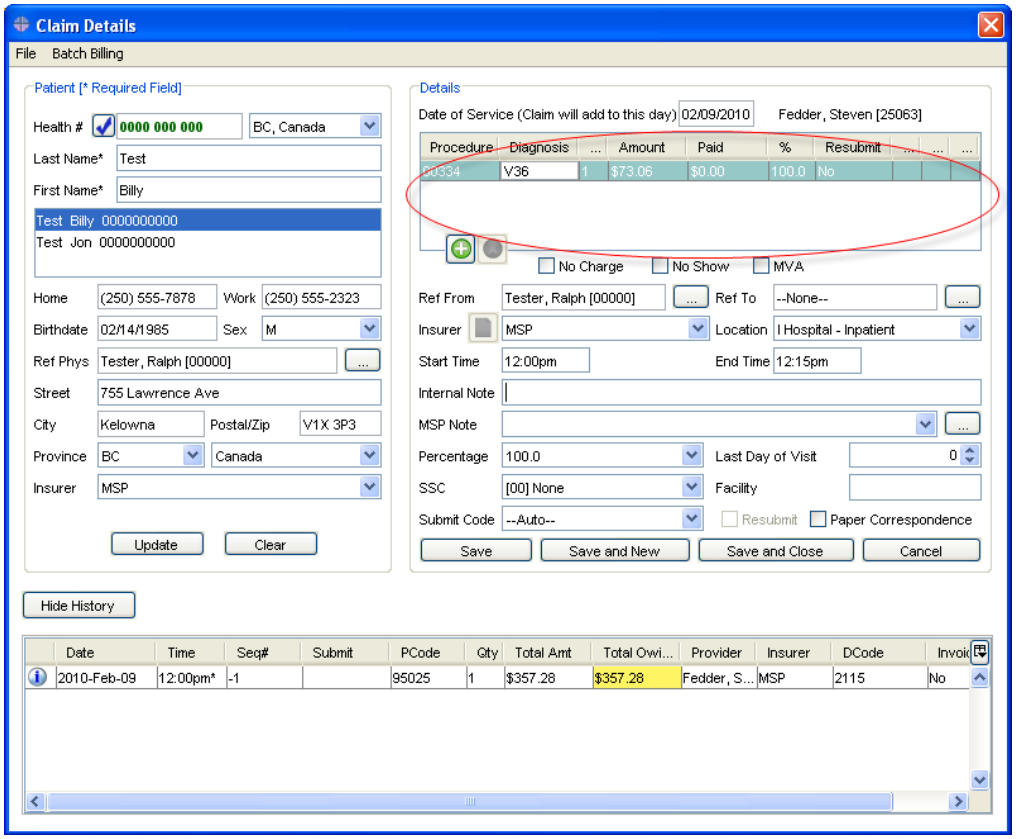
1. Double-click in the space under **Procedure** to highlight it.
2. Type in either a procedure code, or a keyword which can be searched on in the procedure code's description.
   - ➢ You can also right-click in the space under **Service** and select **Search Procedure Code**. This will open a **Procedure Code** search Dialogue.
3. Select the procedure from the drop-down list.
4. Double-click on the space under **Diagnosis** to highlight it.
5. Type in either a diagnostic code, or a keyword which can be searched on in the diagnostic code's description.
   - ➢ You can also right-click in the space under **Service** and select **Search Diagnostic Code**. This will open a **Diagnostic Code** search Dialogue.

6. You can mark the procedure as **No Charge**, **No Show**, or **MVA** by clicking on the corresponding checkbox.

To add a sub-procedure

1. Click the **Add** button to create a new procedure line.

2. Follow the steps for adding a procedure above.



3. Fill out the rest of the claim and insurer details.

    1. Add or change the **Referred From** provider if necessary.

    2. Select the appropriate **Insurer** if different from the patient's default.

    3. Select a **Start Time** and **End Time** if required (for hospital billing).

    4. Select a **Location** from the drop-down list if necessary.

    5. Type in an **Internal Note** if you need to remember any additional information about the claim.

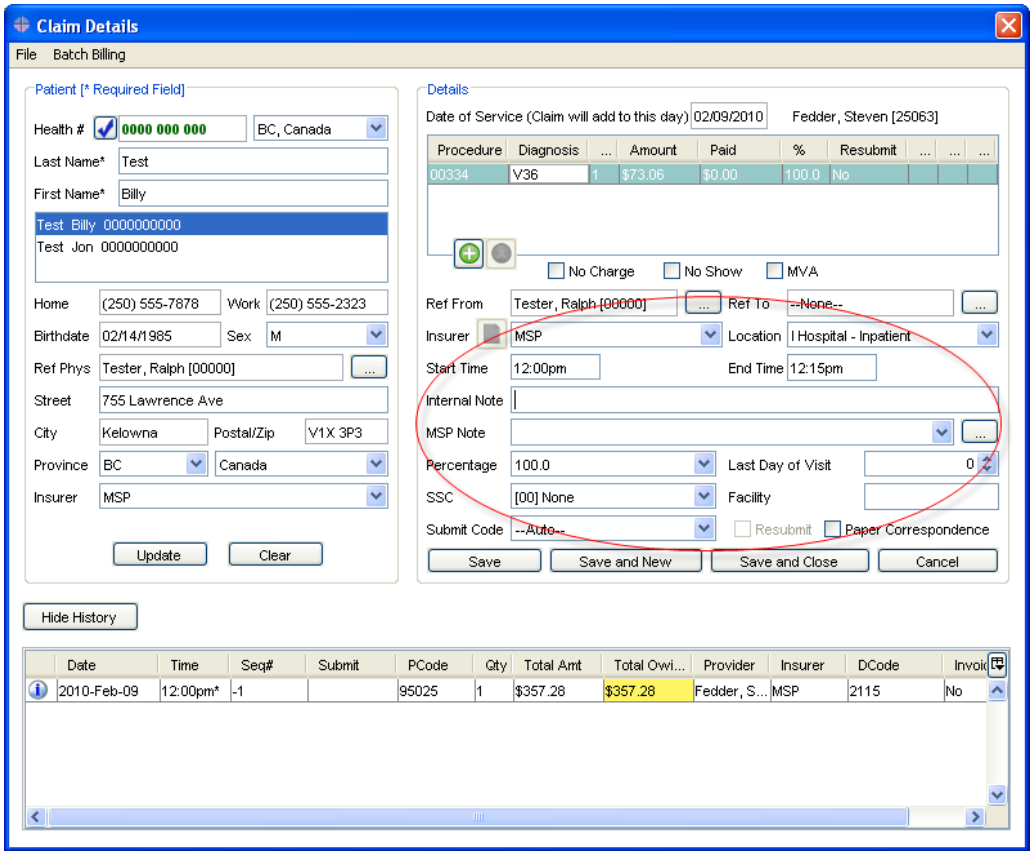
    6. Add an **MCIB Note** macro if required.

    7. Select a billing **Percentage** if different from the default.

8. Select a **First Hospital DOS** and a **Last Hospital DOS** if required.

9. If resubmitting, click the checkbox beside **Resubmit.**

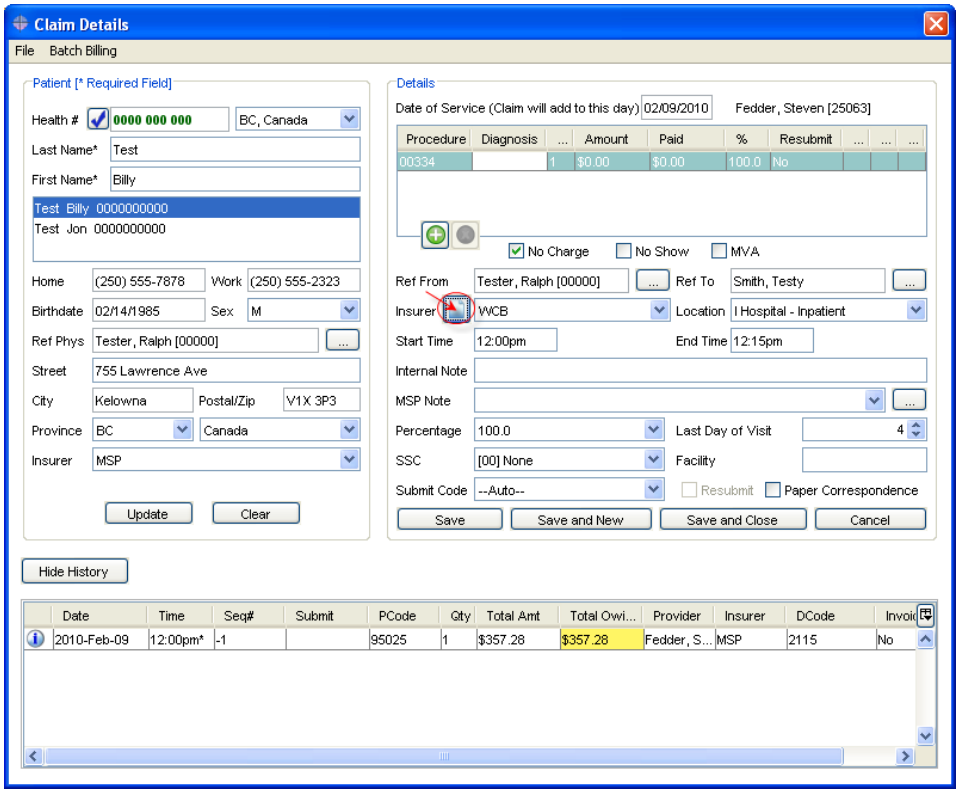
10. If **EMR Fee** is requested, click this checkbox.



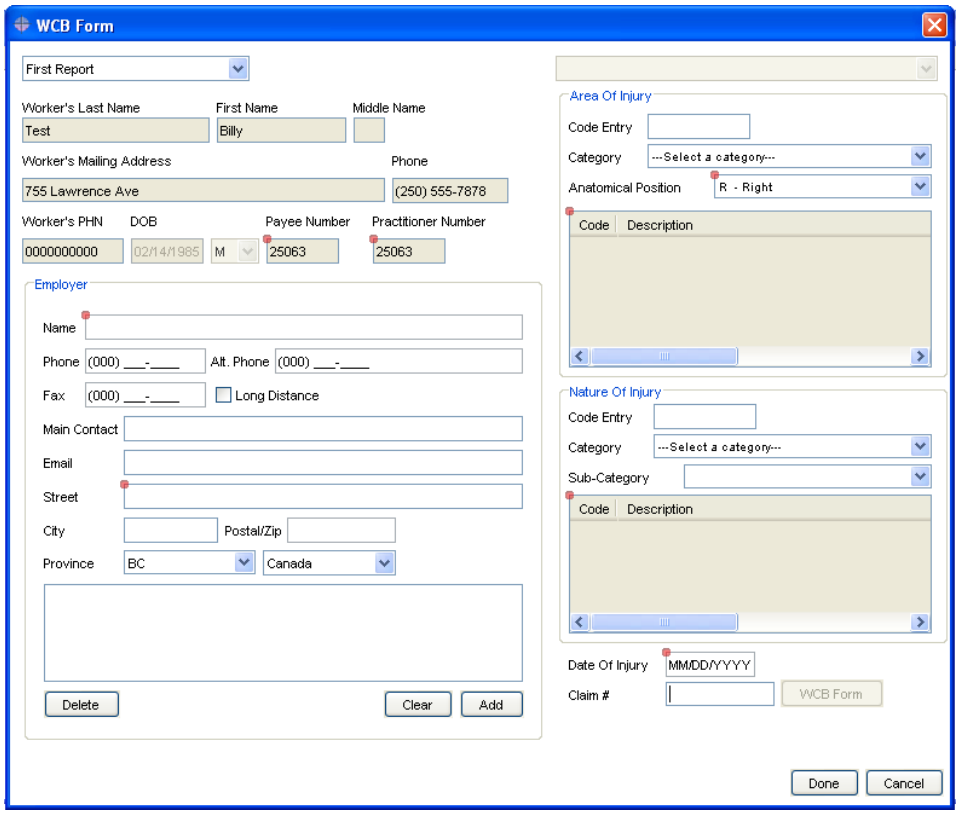
7. Click **Save**, **Save and New**, or **Save and Close** to save the claim.

Filling out WCB Claims

If the insurer is WCB, you may have to fill out the WCB form. You can open this form by clicking the button beside **Insurer** on the **Claim Details** Dialogue.



On the **WCB Form**, all fields with a red dot are required and must be filled in.

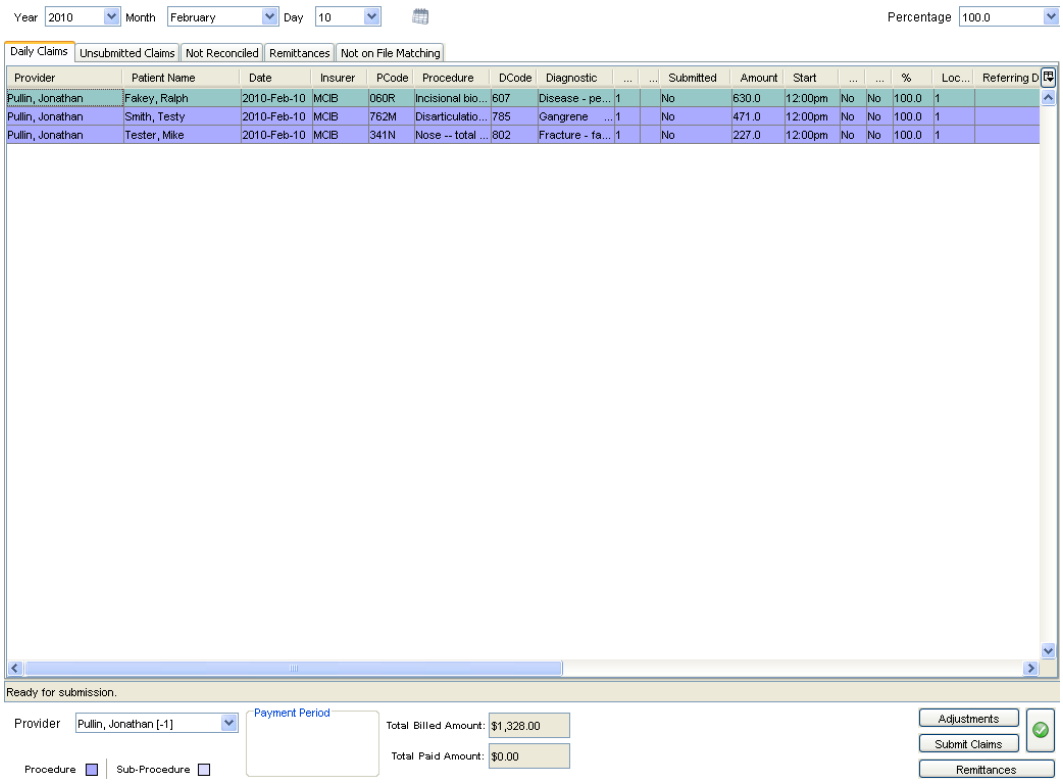


Click the **WCB Form** button to open the **WCB Provider's Invoice and Report** Dialogue. All fields with red dots must also be filled out on this form.

CLAIMS AND BILLING - SASKATCHEWAN

Daily Claims

The **Daily Claims** tab shows ALL claims for the date and the provider selected. This includes both submitted and unsubmitted claims, claims made from appointments and walk-in claims, MCIB, WCB, and private insurer claims.



Creating a New Bill Without an Appointment

From the **Daily Claims** tab, you can quickly create a new bill without an appointment.

To create a new bill in daily claims

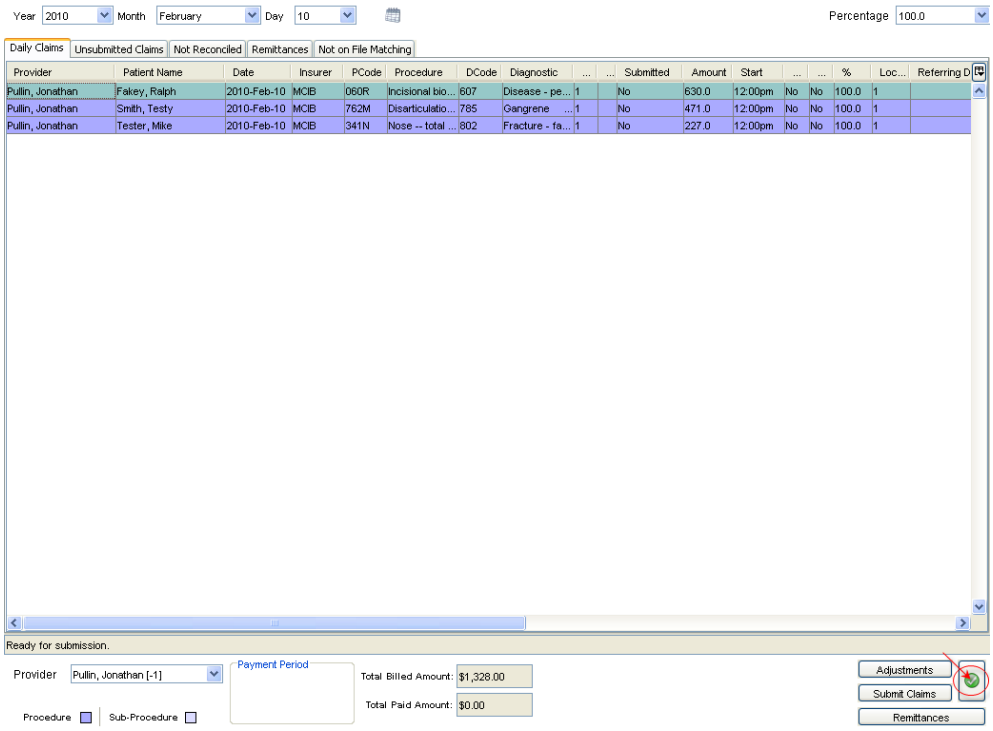
1. Right-click anywhere on the **Daily Claims** tab.
2. Select **New Bill**. This will open a new **Claim Details** Dialogue.

Submitting from Daily Claims

If you submit from the **Daily Claims** tab, only claims from the selected date will be submitted.

To validate claims in the Daily Claims tab

1. Select the date you wish to submit claims from.
2. Click the green **Validate Claims** button located at the bottom-right corner. This will show you any problems with claims.



To submit claims in the Daily Claims tab

1. Select the date you wish to submit claims from.

2. Click the **Submit Claims** button located beside the **Validate Claims** button.

Unsubmitted Claims

The **Unsubmitted Claims** includes all unsubmitted claims from all dates of service for the provider selected. All claims that will be submitted electronically will appear here. Any claims for private insurers will not appear here.

Submitting from Unsubmitted Claims

A submission from **Unsubmitted Claims** will include all claims that have not yet been submitted up to the current date.

To validate from Unsubmitted Claims

- Click the green **Validate Claims** button located at the bottom-right corner.

To submit

- Click the **Submit Claims** button.

Not Reconciled

The **Not Reconciled** tab includes any claims that have been submitted and that have been paid differently than they were billed.

Claims in **Not Reconciled** can be filtered by provider.

Submitting from Not Reconciled

Claims that have been marked for resubmission can be submitted from the **Not Reconciled** tab. Only the claims which you currently have displayed will be submitted.

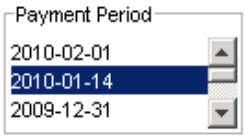
To submit claims from Not Reconciled

1. Choose a provider to filter claims on, or select **-All-** from the drop-down list.
2. Click the **Submit Claims** button located at the bottom-right corner.

Remittances

The **Remittances** tab is a record of all claims that come back in the assessment. No work is done in the **Remittances** tab, it is only for reference.

Assessments can be filtered by **Provider** and by **Payment Period**.



Picking up Remittances

To pick up remittances

- Click the **Remittances** button located at the bottom-right corner.

Not on File Matching

The **Not on File Matching** tab is used to match remittances with the corresponding claims that Accuro was not able to automatically match.

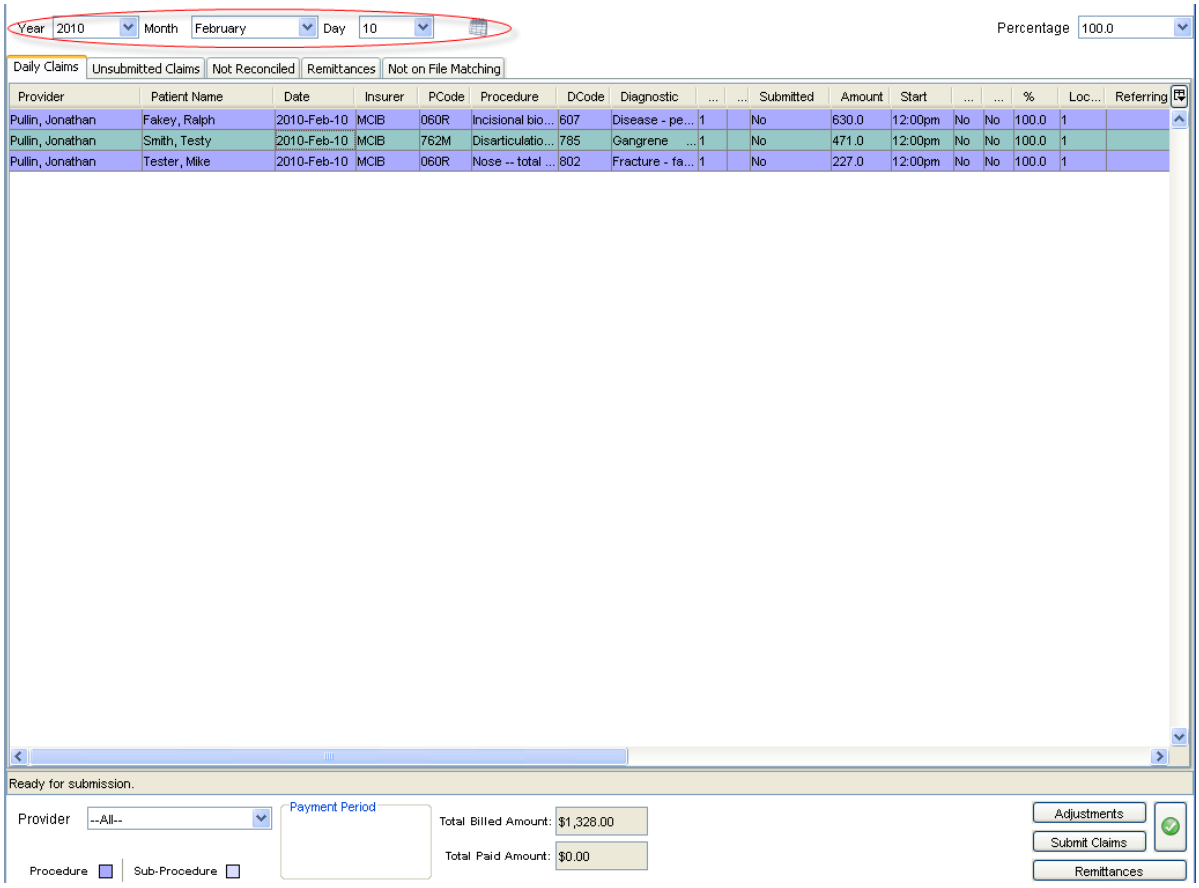
Matching a Remittance

To match a remittance

1. Click on an **Unmatched Record** to select it.
2. Use the **Search Tool** to select a patient.
3. Select a **Possible Match** from the list.
4. Click the **Match** button.

Functions Common to all Tabs

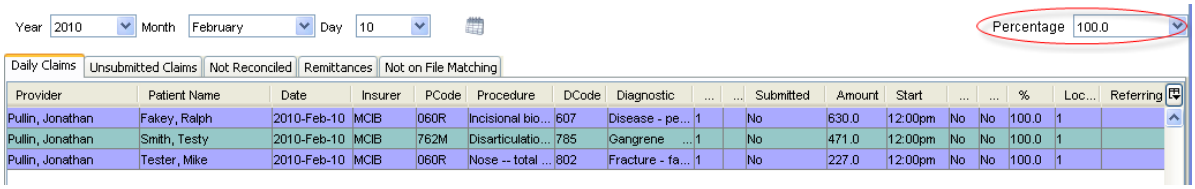
Changing the Date



To change the current date

- Select the **Year**, **Month**, and **Day** that you wish to navigate to from the drop-down lists in the top-left corner.
- Alternatively, you can choose the date from the mini calendar by clicking on the calendar icon.

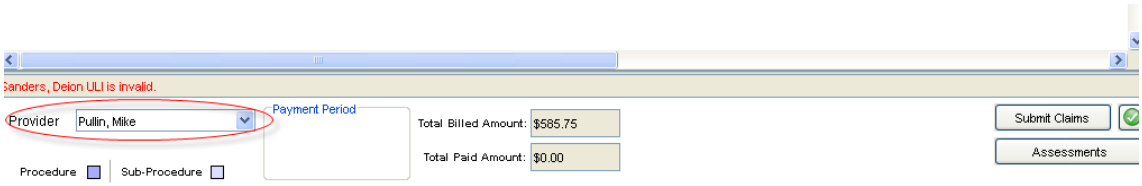
Changing the Claim Percentage



To change the claim percentage

1. Click on a claim to select it.
2. Select the appropriate value from the **Percentage** drop-down list.
   - The default value is 100%.

Changing the Provider



To change the provider

- Select a provider from the drop-down list located at the bottom-left corner.

Viewing Claim Details

To view the details for a claim

1. Point to the claim.
2. Right-click and select **Claim Details**.

Viewing a Claim's History

To view a claim's history

1. Point to the claim.
2. Right-click and select **Claim History**.

Applying a Macro to a Claim

You can apply a macro to a claim from the **Claims** section.

To apply a macro to a claim

1. Point to the claim.
2. Right-click and select **Apply Macro**.

Adding a Sub-Procedure to a Claim

You can quickly add a sub-procedure to a claim.

To add a sub-procedure to a claim

1. Point to a claim.
2. Right-click and select **New Procedure**. This will add a new procedure underneath the selected claim.

Splitting a Bill

Copying a Pre-Existing Claim

You can re-use the details of an existing claim to create a new claim.

To copy a claim

1. Point to a claim.

2. Right-click and select **Copy Claim**.

Deleting a Procedure

You can delete procedures that were not created from an appointment. To delete procedures created from an appointment, you must first cancel the appointment.

To delete a procedure

1. Point to a claim.
2. Right-click and select **Delete Procedure**.

Marking a Claim for Resubmission

Any claims that are returned to **Not Reconciled** or **Remittances** may be adjusted and then marked for resubmission.

To mark a claim for resubmission

1. Point to a claim you wish to mark for resubmission.
2. Right-click and select **Resubmit**.
    - You can also choose **Resubmit All** if you would like to mark all the claims for resubmission.

Overriding GST

You can change the percentage that is charged for GST on a claim.

To override GST

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **Override GST**.
4. Enter the percentage amount you wish to bill for.

Setting the Location for a Claim

You can quickly change the location for a claim.

To change the location for a claim

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **Set Location**.
4. Select a location from the drop-down list.
5. Click **OK**.

Marking a Claim as Invoiced

To mark a claim as invoiced

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select **Mark as Invoiced**.
4. Select an invoice date from the pop-up mini calendar.

Setting a Claim to No Charge, NO SHOW, Adjust-to-Paid, Write-Off

No Charge is used for anything that was billed incorrectly or for a service the provider does not wish to charge for.

No Show is used when a patient does not show for their appointment.

Adjust-to-Paid is used for any overpayments or underpayments. It assumes the amount paid is correct and adjusts the billed amount to the paid amount. Use this cautiously as only development can remove it if applied incorrectly.

Claims that should have been paid but will not be paid may be set as a **Write-Off**. A **Write-Off Report** can be submitted for tax purposes at year end.

To set a claim to No Charge, No Show, Adjust-to-Paid, Write-off

1. Point to the claim.
2. Right-click and navigate to **Options** in the pop-up menu.
3. Select one of **No Charge**, **No Show**, **Adjust-to-Paid**, or **Write-off**.

Viewing a Claim's Associated Appointment

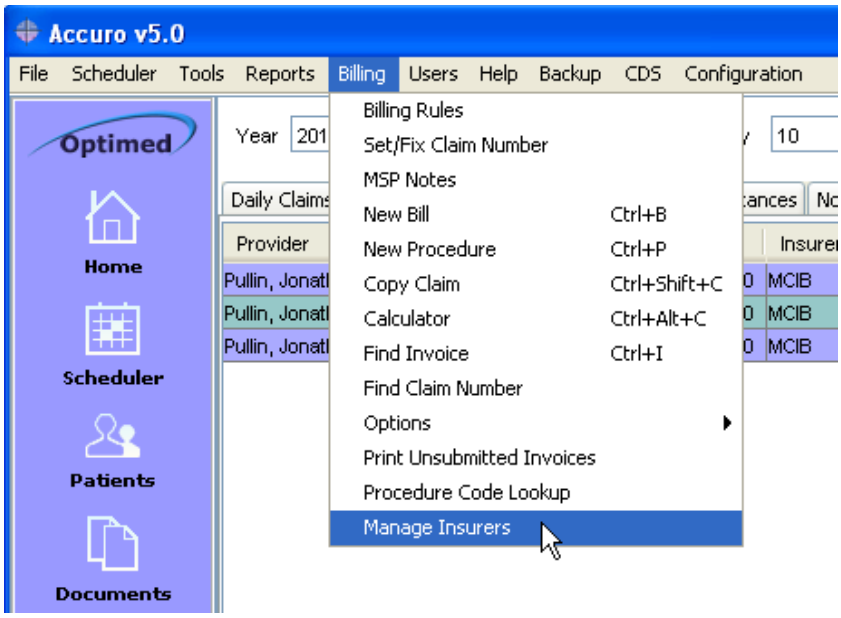
If a claim was made from an appointment in the **Scheduler**, you can quickly view that appointment.

To view a claim's appointment

1. Point to a claim.
2. Right-click and select navigate to **View**.
3. Select **Go To Appointment**.
    - If the claim was not created from an appointment, this option will be disabled.

The Billing Menu

On the main menu bar, there is a **Billing** menu.



Billing Menu Items

Billing Rules – Create, edit, and remove billing rules

Set/Fix Sequence Number – Used when submissions get out of sequence

MSP Notes – View messages sent from MCIB

New Bill – Open a blank claim details Dialogue to create a new bill

New Procedure – Add a sub-procedure to a selected bill

Copy Claim – Create a copy of an existing claim with today's date

Calculator – Open a calculator feature

Find Invoice – Find an invoice based on an invoice number

Find Claim Number – Find the invoice associated with a claim

Options –

Manage Procedures – Create and edit Procedure Codes

Manage Procedure Categories – Create, edit, and delete Procedure Code Categories

Manage Submissions – Resend an entire submission in the event that a batch was rejected

Service Code Accounts – Create, edit, and delete Service Code Accounts

Print Unsubmitted Invoices – Print a list of unsubmitted invoices

Procedure Code Lookup – Search for a procedure code on either code or keyword

Manage Insurers – Create, edit, and delete private insurers

Claim Details

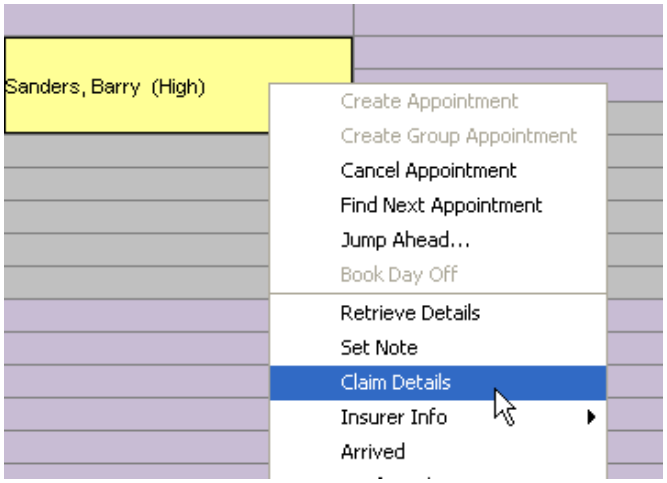
The **Claim Details** Dialogue is used to enter information for a claim. You can create new claims or edit existing ones.

Opening the Claim Details Dialogue

There are several ways to open the **Claim Details** Dialogue.

To open claim details from an appointment in the scheduler

1. Point to the appointment in the **Scheduler**.
2. Right-click and select **Claim Details**.



To open claim details for an existing claim in the claims section

- Double-click on an existing claim.
- Right-click on an existing claim and select **Claim Details**.

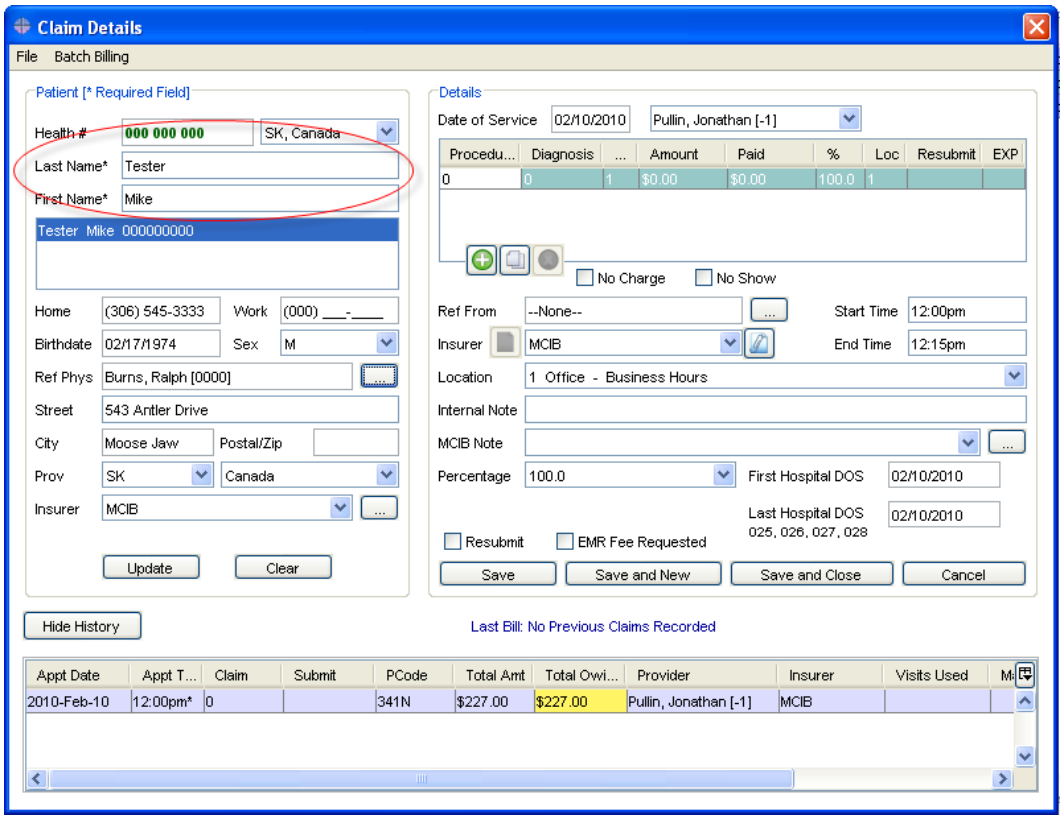
To open claim details for a new claim under daily claims

1. Right-click anywhere on the daily claims tab.
2. Select **New Bill**.

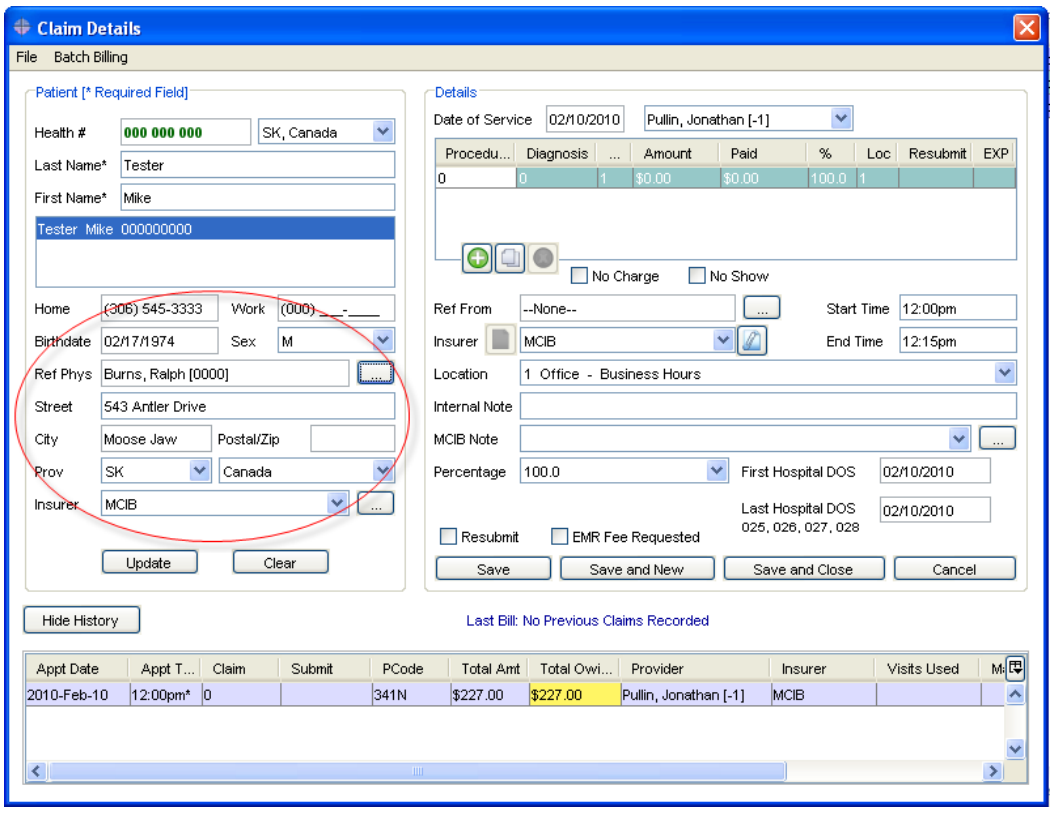
Filling out Claim Details

To fill out the claim details Dialogue

1. If a claim has been opened from an appointment, the patient will already be loaded. If you are creating a new bill from **Daily Claims**, you will need to load a patient using the **Search Tool**.


Claim Details
File Batch Billing
Patient [* Required Field]
Health # 000 000 000 SK, Canada
Last Name* Tester
First Name* Mike
Tester Mike 000000000
Home (306) 545-3333 Work (000) ___-____
Birthdate 02/17/1974 Sex M
Ref Phys Burns, Ralph [0000]
Street 543 Antler Drive
City Moose Jaw Postal/Zip
Prov SK Canada
Insurer MCIB
Update Clear
Details
Date of Service 02/10/2010 Pullin, Jonathan [-1]
Procedu... Diagnosis ... Amount Paid % Loc Resubmit EXP
0 0 1 $0.00 $0.00 100.0 1
No Charge No Show
Ref From --None-- Start Time 12:00pm
Insurer MCIB End Time 12:15pm
Location 1 Office - Business Hours
Internal Note
MCIB Note
Percentage 100.0 First Hospital DOS 02/10/2010
Last Hospital DOS 02/10/2010
025, 026, 027, 028
Resubmit EMR Fee Requested
Save Save and New Save and Close Cancel
Hide History
Last Bill: No Previous Claims Recorded
Appt Date Appt T... Claim Submit PCode Total Amt Total Owi... Provider Insurer Visits Used
2010-Feb-10 12:00pm* 0 341N $227.00 $227.00 Pullin, Jonathan [-1] MCIB

2. Ensure the patient details are correct.


Claim Details
File Batch Billing
Patient [* Required Field]
Health # 000 000 000 SK, Canada
Last Name* Tester
First Name* Mike
Tester Mike 000000000
Home (306) 545-3333 Work (000) ___-____
Birthdate 02/17/1974 Sex M
Ref Phys Burns, Ralph [0000]
Street 543 Antler Drive
City Moose Jaw Postal/Zip
Prov SK Canada
Insurer MCIB
Update Clear
Details
Date of Service 02/10/2010 Pullin, Jonathan [-1]
Procedu... Diagnosis ... Amount Paid % Loc Resubmit EXP
0 0 1 $0.00 $0.00 100.0 1
No Charge No Show
Ref From --None-- Start Time 12:00pm
Insurer MCIB End Time 12:15pm
Location 1 Office - Business Hours
Internal Note
MCIB Note
Percentage 100.0 First Hospital DOS 02/10/2010
Last Hospital DOS 02/10/2010
025, 026, 027, 028
Resubmit EMR Fee Requested
Save Save and New Save and Close Cancel
Hide History
Last Bill: No Previous Claims Recorded
Appt Date Appt T... Claim Submit PCode Total Amt Total Owi... Provider Insurer Visits Used
2010-Feb-10 12:00pm* 0 341N $227.00 $227.00 Pullin, Jonathan [-1] MCIB

3. Ensure the **Date of Service** and **Provider** are correct.

4. Add a procedure and any necessary sub-procedures for the claim.

To add a procedure

1. Double-click in the space under **Procedure** to highlight it.

2. Type in either a procedure code, or a keyword which can be searched on in the procedure code's description.

   - You can also right-click in the space under **Service** and select **Search Procedure Code**. This will open a **Procedure Code** search Dialogue.

3. Select the procedure from the drop-down list.

4. Double-click on the space under **Diagnosis** to highlight it.

5. Type in either a diagnostic code, or a keyword which can be searched on in the diagnostic code's description.

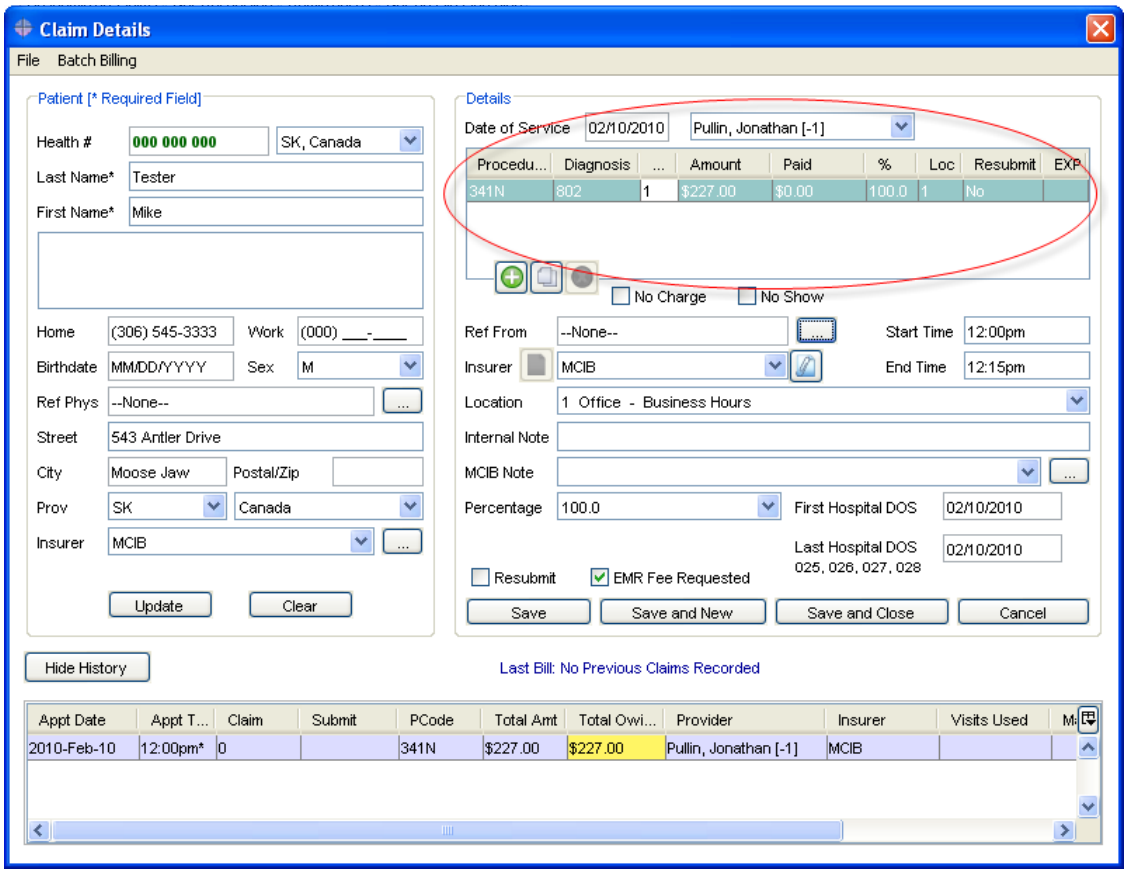
   - You can also right-click in the space under **Service** and select **Search Diagnostic Code**. This will open a **Diagnostic Code** search Dialogue.

6. You can mark the procedure as **No Charge** or **No Show** by clicking on the corresponding checkbox.

To add a sub-procedure

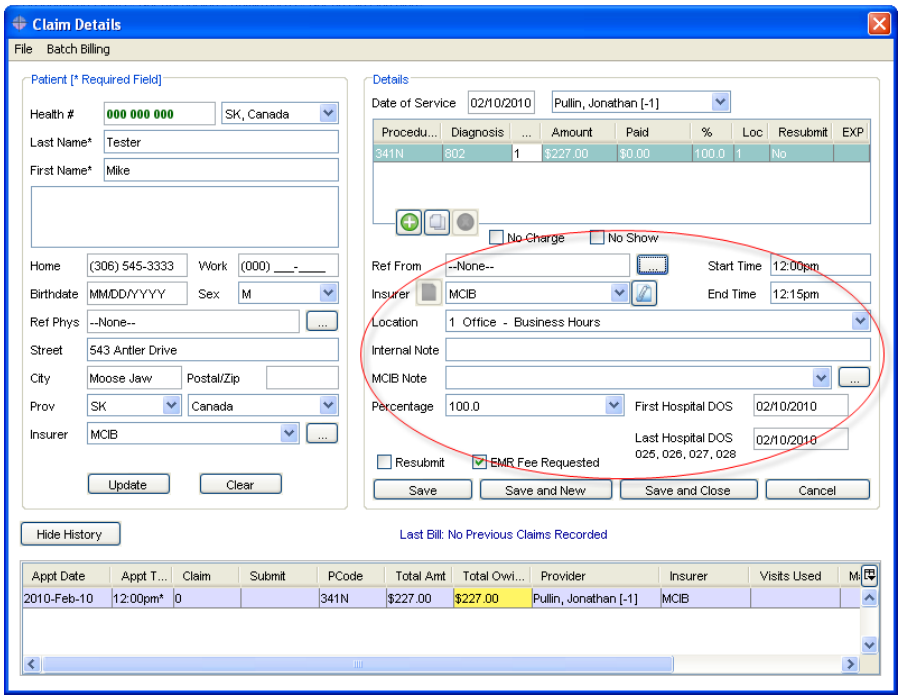
1. Click the **Add** button to create a new procedure line.

2. Follow the steps for adding a procedure above.



5. Fill out the rest of the claim and insurer details.

    1. Add or change the **Referred From** provider if necessary.
    2. Select the appropriate **Insurer** if different from the patient's default.
    3. Select a **Start Time** and **End Time** if required (for hospital billing).
    4. Select a **Location** from the drop-down list if necessary.
    5. Type in an **Internal Note** if you need to remember any additional information about the claim.
    6. Add an **MCIB Note** macro if required.
    7. Select a billing **Percentage** if different from the default.
    8. Select a **First Hospital DOS** and a **Last Hospital DOS** if required.
    9. If resubmitting, click the checkbox beside **Resubmit.**
    10. If **EMR Fee** is requested, click this checkbox.



6. Click **Save**, **Save and New**, or **Save and Close** to save the claim.

CLAIMS AND BILLING - MANITOBA

Daily Claims

The Daily Claims tab shows ALL claims for the date and the provider selected. This includes both submitted and unsubmitted claims, claims made from appointments and walk-in claims, MHSC, WCB, and private insurer claims.

Creating a New Bill Without an Appointment

From the Daily Claims tab, you can quickly create a new bill without an appointment.

To create a new bill in daily claims

1. Right-click anywhere on the Daily Claims tab.
2. Select New Bill. This will open a new Claim Details Dialogue.

Submitting From Daily Claims

If you submit from the Daily Claims tab, only claims from the selected date will be submitted. This is a good way to keep your submissions small and narrow down problems with WCB claims since a problem with one claim will stop the entire submission.

To Validate Claims in the Daily Claims Tab

1. Select the date you wish to submit claims from.
2. Click the green Validate Claims button located at the bottom-right corner. This will show you any problems with claims.

To Submit Claims in the Daily Claims Tab

1. Select the date you wish to submit claims from.
2. Click the Submit Claims button located beside the Validate Claims button.

Unsubmitted Claims

The Unsubmitted Claims includes all unsubmitted claims from all dates of service for the provider selected. All claims that will be submitted electronically will appear here. Any claims for private insurers will not appear here.

Adding a Sub-Procedure to a Claim

You can quickly add a sub-procedure to a claim in the Unsubmitted Claims tab.

To add a sub-procedure to a claim

1. Point to a claim.
2. Right-click and select New Procedure. This will add a new procedure underneath the selected claim.

Submitting from Unsubmitted Claims

A submission from Unsubmitted Claims will include all claims that have not yet been submitted up to the current date.

To Validate from Unsubmitted Claims

1. Click the green Validate Claims button located at the bottom-right corner.

To Submit

2. Click the Submit Claims button.

Not Reconciled

The Not Reconciled tab includes any claims that have been submitted and that have not been paid for the amount billed. This will include any overpayments, underpayments, rejections, and reversals.

There are several options for which assessments are displayed.

Show Overpayments – Overpayments will be included in the shown assessments

Show Refusals – Refusals will be included in the shown assessments

Show Selected Assessment – Only assessments from the selected Payment Period below will be shown

Show All Assessments – All assessments will be shown

You can also filter assessments by Explanatory Code(s).

Submitting From Not Reconciled

Assessments that have been marked for resubmission can be submitted from the Not Reconciled tab. Only the assessments which you currently have displayed will be submitted.

To Submit Claims From Not Reconciled

1. Choose a payment period and filter your claims how you desire.
2. Click the Submit Claims button located at the bottom-right corner.

Remittances

The Remittances tab is a record of all claims that come back in the assessment. No work is done in the Remittances tab, it is only for reference.

Assessments can be filtered by Provider and by Payment Period.

Picking Up Remittances

To Pick Up Remittances

1. Click the Remittances button located at the bottom-right corner.

Functions Common to All Tabs

Changing the Date

To change the current date

1. Select the Year, Month, and Day that you wish to navigate to from the drop-down lists in the top-left corner.
2. Alternatively, you can choose the date from the mini calendar by clicking on the calendar icon.

Changing the Claim Percentage

To change the claim percentage

1. Click on a claim to select it.
2. Select the appropriate value from the Percentage drop-down list.
3. The default value is 100%.

Changing the Provider

To change the provider

1. Select a provider from the drop-down list located at the bottom-left corner.

Viewing the Claim Details

To view the details for a claim

1. Point to the claim.
2. Right-click and select Claim Details.

Viewing a Claim's History

To view a claim's history

1. Point to the claim.
2. Right-click and select Claim History.

Applying a Macro to a Claim

You can apply a macro to a claim from the Claims section.

To apply a macro to a claim

1. Point to the claim.
2. Right-click and select Apply Macro.

Copying a Pre-Existing Claim

You can re-use the details of an existing claim to create a new claim.

To copy a claim

1. Point to a claim.
2. Right-click and select Copy Claim.

Deleting a Procedure

You can delete procedures that were not created from an appointment. To delete procedures created from an appointment, you must first cancel the appointment.

To delete a procedure

1. Point to a claim.
2. Right-click and select Delete Procedure.

Marking a Claim for Resubmission

Any claims that are returned to Not Reconciled may be adjusted and then marked for resubmission.

To mark a claim for resubmission

1. Point to a claim you wish to mark for resubmission.
2. Right-click and select Resubmit.
3. You can also choose Resubmit All if you would like to mark all the claims for resubmission.

Overriding GST and PST

You can change the percentage that is charged for GST on a claim.

To override GST

1. Point to the claim.
2. Right-click and navigate to Options in the pop-up menu.
3. Select Override GST.
4. Enter the percentage amount you wish to bill for.

Marking a Claim as Invoiced

To mark a claim as invoiced

1. Point to the claim.
2. Right-click and navigate to Options in the pop-up menu.
3. Select Mark as Invoiced.
4. Select an invoice date from the pop-up mini calendar.

Setting a Claim to No Charge, NO SHOW, Adjust-to-Paid, Write-Off

No Charge is used for anything that was billed incorrectly or for a service the provider does not wish to charge for.

No Show is used when a patient does not show for their appointment.

Adjust-to-Paid is used for any overpayments or underpayments. It assumes the amount paid is correct and adjusts the billed amount to the paid amount. Use this cautiously as only development can remove it if applied incorrectly.

Claims that should have been paid but will not be paid may be set as a Write-Off. A Write-Off Report can be submitted for tax purposes at year end.

To set a claim to No Charge, No Show, Adjust-to-Paid, Write-off

1. Point to the claim.
2. Right-click and navigate to Options in the pop-up menu.
3. Select one of No Charge, No Show, Adjust-to-Paid, or Write-off.

Marking a Claim as a Motor Vehicle Accident (MVA)

If a claim is related to a Motor Vehicle Accident, it should be marked as MVA before submitting.

To mark a claim as MVA

1. Point to the claim.
2. Right-click and navigate to Options in the pop-up menu.
3. Select MVA.

Viewing a Claim's Associated Appointment

If a claim was made from an appointment in the Scheduler, you can quickly view that appointment.

To view a claim's appointment

1. Point to a claim.
2. Right-click and select navigate to View.
3. Select Go To Appointment.
4. If the claim was not created from an appointment, this option will be disabled.

The Billing Menu

On the main menu bar, there is a Billing menu.

Billing Menu Items

Default Sub-Percentage – Change the default percentage that sub-procedures are billed at

Billing Rules – Create, edit, and remove billing rules

Maximize Bills – When adding sub-procedures to a bill, put the most expensive procedure as the main procedure (always billed at 100%)

New Bill – Open a blank claim details Dialogue to create a new bill

New Procedure – Add a sub-procedure to a selected bill

Calculator – Open a calculator feature

Find Invoice – Find an invoice based on an invoice number

Find Sequence Number – Find the last sequence number for submitted claims

Options –

Manage Diagnostic Codes – Create and edit Diagnostic Codes

Manage Procedures – Create and edit Procedure Codes

Manage Procedure Categories – Create, edit, and delete Procedure Code Categories

Service Code Accounts – Create, edit, and delete Service Code Accounts

Manage Practitioner Number Rules –

Setup Billing Numbers --

Procedure Code Lookup – Search for a procedure code on either code or keyword

Manage Insurers – Create, edit, and delete private insurers

CLAIM DETAILS

The Claim Details Dialogue is used to enter information for a claim. You can create new claims or edit existing ones.

OPENING THE CLAIM DETAILS DIALOGUE

There are several ways to open the Claim Details Dialogue.

To open claim details from an appointment in the scheduler

1. Point to the appointment in the Scheduler.
2. Right-click and select Claim Details.

To open claim details for an existing claim in the claims section

1. Double-click on an existing claim.
2. Right-click on an existing claim and select Claim Details.

To open claim details for a new claim under daily claims

1. Right-click anywhere on the daily claims tab.
2. Select New Bill.

FILLING OUT CLAIM DETAILS

To fill out the claim details Dialogue

1. If a claim has been opened from an appointment, the patient will already be loaded. If you are creating a new bill from Daily Claims, you will need to load a patient using the Search Tool.
2. Ensure the patient details are correct.
3. Ensure the Date of Service and Provider are correct.
4. Change or add a Referred By patient if required.
5. Add a procedure and any necessary sub-procedures for the claim.

To add a procedure

1. Double-click in the space under Procedure to highlight it.
2. Type in either a procedure code, or a keyword which can be searched on in the procedure code's description.
3. Select the procedure from the drop-down list.
4. Double-click on the space under Diagnosis to highlight it.
5. Type in either a diagnostic code, or a keyword which can be searched on in the diagnostic code's description.

To add a sub-procedure

1. Click the Add button to create a new procedure line.
2. Follow the steps for adding a procedure above.
3. Fill out the bill details.

    1. Select the appropriate Insurer if different from the patient's default.

2. Select a Start Time and End Time if required (for hospital billing).
3. Select a Pract # from the drop-down list.
4. Select a Specialty from the drop-down list.
5. Select a Prefix if different from the default.
6. Select a Facility # if different from the default.
7. Select a Hospital if necessary.
8. Select a Location Indicator if necessary.
9. Select a Percentage if different from the default.
10. Click on the Resubmit checkbox if resubmitting the claim.
11. Type any additional information into the Internal Note field.

4. Click on the Additional Information tab and fill out any necessary fields.
5. Click Save, Save and New, or Save and Close to save the claim.

Filling out WCB Claims

If the insurer is WCB, you may have to fill out the WCB form. You can open this form by clicking the button beside Insurer on the Claim Details Dialogue.

CLAIMS AND BILLING - ONTARIO

Daily Claims

The Daily Claims tab shows ALL claims for the date and the provider selected. This includes both submitted and unsubmitted claims, claims made from appointments and walk-in claims, OHIP, WCB, and private insurer claims.

Creating a New Bill Without an Appointment

From the Daily Claims tab, you can quickly create a new bill without an appointment.

To create a new bill in daily claims

1. Right-click anywhere on the Daily Claims tab.
2. Select New Bill. This will open a new Claim Details Dialogue.

Submitting From Daily Claims

If you submit from the Daily Claims tab, only claims from the selected date will be submitted.

To validate claims in the Daily Claims tab

1. Select the date you wish to submit claims from.
2. Click the green Validate Claims button located at the bottom-right corner. This will show you any problems with claims.

To submit claims in the Daily Claims tab

1. Select the date you wish to submit claims from.
2. Click the Submit Claims button located beside the Validate Claims button.

Unsubmitted Claims

The Unsubmitted Claims includes all unsubmitted claims from all dates of service for the provider selected. All claims that will be submitted electronically will appear here. Any claims for private insurers will not appear here.

Adding a Sub-Procedure to a Claim

You can quickly add a sub-procedure to a claim in the Unsubmitted Claims tab.

To add a sub-procedure to a claim

1. Point to a claim.
2. Right-click and select New Procedure. This will add a new procedure underneath the selected claim.

Submitting from Unsubmitted Claims

A submission from Unsubmitted Claims will include all claims that have not yet been submitted up to the current date.

To validate from Unsubmitted Claims

- Click the green Validate Claims button located at the bottom-right corner.

To submit

- Click the Submit Claims button.

NOT RECONCILED

The Not Reconciled tab includes any claims that have been submitted and that have not been paid for the amount billed. This will include any overpayments, underpayments, rejections, and reversals.

There are several options for which assessments are displayed.

Show Overpayments – Overpayments will be included in the shown remittances

Show Refusals – Refusals will be included in the shown remittances

Show Selected Remittances – Only remittances from the selected Payment Period below will be shown

Show All Remittances – All remittances will be shown

You can also filter remittances by Explanatory Code(s).

Submitting From Not Reconciled

Remittances that have been marked for resubmission can be submitted from the Not Reconciled tab. Only the remittances which you currently have displayed will be submitted.

To Submit Claims from Not Reconciled

1. Choose a payment period and filter your claims how you desire.
2. Click the Submit Claims button located at the bottom-right corner.

Remittances

The Remittances tab is a record of all claims that come back in the remittance. No work is done in the Remittances tab, it is only for reference.

Assessments can be filtered by Provider and by Payment Period.

Picking up Remittances

To pick up remittances

1. Click the Remittances button located at the bottom-right corner.

Functions Common to All Tabs

Changing the Date

To Change the Current Date

1. Select the Year, Month, and Day that you wish to navigate to from the drop-down lists in the top-left corner.
2. Alternatively, you can choose the date from the mini calendar by clicking on the calendar icon.

Changing the Claim Percentage

To change the claim percentage

1. Click on a claim to select it.

2. Select the appropriate value from the Percentage drop-down list.
3. The default value is 100%.

Changing the Provider

To change the provider

- Select a provider from the drop-down list located at the bottom-left corner.

Viewing Claim Details

To view the details for a claim

1. Point to the claim.
2. Right-click and select Claim Details.

Viewing a Claim's History

To view a claim's history

1. Point to the claim.
2. Right-click and select Claim History.

Applying a Macro to a Claim

You can apply a macro to a claim from the Claims section.

To apply a macro to a claim

1. Point to the claim.
2. Right-click and select Apply Macro.

Copying a Pre-Existing Claim

You can re-use the details of an existing claim to create a new claim.

To copy a claim

1. Point to a claim.
2. Right-click and select Copy Claim.

Deleting a Procedure

You can delete procedures that were not created from an appointment. To delete procedures created from an appointment, you must first cancel the appointment.

To delete a procedure

1. Point to a claim.
2. Right-click and select Delete Procedure.

Marking a Claim for Resubmission

Any claims that are returned to Not Reconciled may be adjusted and then marked for resubmission.

To mark a claim for resubmission

1. Point to a claim you wish to mark for resubmission.
2. Right-click and select Resubmit.

You can also choose Resubmit All if you would like to mark all the claims for resubmission.

Overriding GST and PST

You can change the percentage that is charged for GST on a claim.

To override GST

1. Point to the claim.
2. Right-click and navigate to Options in the pop-up menu.
3. Select Override GST.
4. Enter the percentage amount you wish to bill for.

Marking a Claim as Invoiced

To mark a claim as invoiced

1. Point to the claim.
2. Right-click and navigate to Options in the pop-up menu.
3. Select Mark as Invoiced.
4. Select an invoice date from the pop-up mini calendar.

Setting a Claim to No Charge, NO SHOW, Adjust-to-Paid, Write-Off

No Charge is used for anything that was billed incorrectly or for a service the provider does not wish to charge for.

No Show is used when a patient does not show for their appointment.

Adjust-to-Paid is used for any overpayments or underpayments. It assumes the amount paid is correct and adjusts the billed amount to the paid amount. Use this cautiously as only development can remove it if applied incorrectly.

Claims that should have been paid but will not be paid may be set as a Write-Off. A Write-Off Report can be submitted for tax purposes at year end.

To set a claim to No Charge, No Show, Adjust-to-Paid, Write-off

1. Point to the claim.
2. Right-click and navigate to Options in the pop-up menu.
3. Select one of No Charge, No Show, Adjust-to-Paid, or Write-off.

Viewing a Claim's Associated Appointment

If a claim was made from an appointment in the Scheduler, you can quickly view that appointment.

To view a claim's appointment

1. Point to a claim.
2. Right-click and select navigate to View.
3. Select Go To Appointment.

If the claim was not created from an appointment, this option will be disabled.

THE BILLING MENU

On the main menu bar, there is a Billing menu.

BILLING MENU ITEMS

Default Sub-Percentage – Change the default percentage that sub-procedures are billed at

Billing Rules – Create, edit, and remove billing rules

Maximize Bills – When adding sub-procedures to a bill, put the most expensive procedure as the main procedure (always billed at 100%)

New Bill – Open a blank claim details Dialogue to create a new bill

New Procedure – Add a sub-procedure to a selected bill

Calculator – Open a calculator feature

Find Invoice – Find an invoice based on an invoice number

Options –

Manage Procedures – Create and edit Procedure Codes

Manage Procedure Categories – Create, edit, and delete Procedure Code Categories

Service Code Accounts – Create, edit, and delete Service Code Accounts

Procedure Code Lookup – Search for a procedure code on either code or keyword

Manage Insurers – Create, edit, and delete private insurers

Claim Details

The Claim Details Dialogue is used to enter information for a claim. You can create new claims or edit existing ones.

Opening the Claim Details Dialogue

There are several ways to open the Claim Details Dialogue.

To open claim details from an appointment in the scheduler

1. Point to the appointment in the Scheduler.
2. Right-click and select Claim Details.

To open claim details for an existing claim in the claims section

1. Double-click on an existing claim.
2. Right-click on an existing claim and select Claim Details.

To open claim details for a new claim under daily claims

1. Right-click anywhere on the daily claims tab.

2. Select New Bill.

Filling out Claim Details

To fill out the claim details Dialogue

1. If a claim has been opened from an appointment, the patient will already be loaded. If you are creating a new bill from Daily Claims, you will need to load a patient using the Search Tool.
2. Ensure the Provider is correct.
3. Change or add a Referred By patient if required.
4. Add a procedure and any necessary sub-procedures for the claim.

To add a procedure

1. Double-click in the space under Procedure to highlight it.
2. Type in either a procedure code, or a keyword which can be searched on in the procedure code's description.
3. Select the procedure from the drop-down list.
4. Double-click on the space under Diagnosis to highlight it.
5. Type in either a diagnostic code, or a keyword which can be searched on in the diagnostic code's description.

To add a sub-procedure

1. Click the Add button to create a new procedure line.
2. Follow the steps for adding a procedure above.
3. Fill out the bill details.

    1. Select the appropriate Insurer if different from the patient's default.
    2. Select a Start Time and End Time if required (for hospital billing).
    3. Select a Pract # from the drop-down list.
    4. Select a Master Number from the drop-down list.
    5. Select a Location if different from the default.
    6. Select a Suffix if different from the default.
    7. Select a Admission Date if necessary.
    8. Select a Percentage if different from the default.
    9. Type any additional information into the Internal Note field.

6. Click on the Additional Information tab and fill out any necessary fields.
7. Click Save, Save and New, or Save and Close to save the claim.

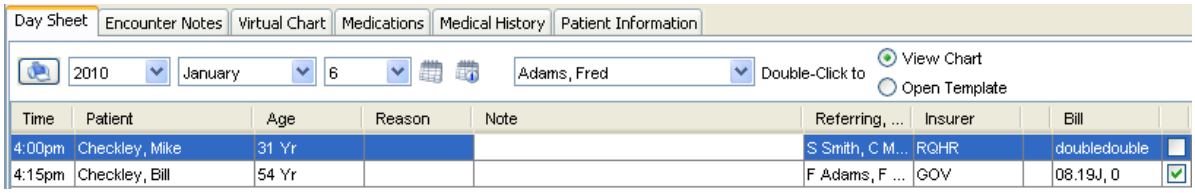
Filling out WCB Claims

If the insurer is WCB, you may have to fill out the WCB form. You can open this form by clicking the button beside Insurer on the Claim Details Dialogue.

EMR

Day Sheet

The **Day Sheet** is to view physician's schedules, enter billing information with the use of macros, create letters, enter notes, and communicate with other staff members.



The **Day Sheet** is loaded with all the appointments for the day selected in the drop-down list of the **Date Navigation** bar and for the physician selected in the **Physician** drop-down list.

The background color of each appointment corresponds to the color chosen for the appointment type.

Any row that has a check mark in the **Billing** check box is completed or approved.

To perform an action for an appointment

1. Select the appointment
2. Right-click the appointment
3. From the menu you can select one of the following actions:
    - **View Bill –** Opens *Claim Details* screen in a new window
    - **Set Macro –** Opens the *Macro Manager* screen in a new window
    - **Send Message –** Opens the *New Followup Message* screen in a new window
    - **Lock Chart** – Limit access to the patient chart
    - **Add Task** - Adds a task for a person on a patient
    - **Approve** - For approving a macro and sending it to billing
    - **Approve All** - For approving all macros and sending them to billing

Viewing a Bill

To view the Claim Details window for a patient from the day sheet

1. Select the patient whose claim details you want to see
2. Right click the patient and select **View Bill** from the list

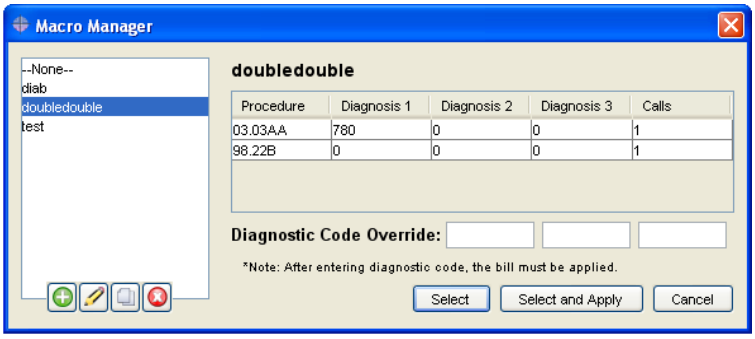
Adding a Billing Macro

Billing is often repetitively creating claims with the same procedure and diagnostic codes. To save time, **Billing Macros** are available to template these common billings.

To add a new a billing macro

1. Select an appointment
2. Right-click and select **Set Macro**
3. In the **Macro Manager** window:
4. Click the Add button , this opens the *Create Macro* window
5. Type an appropriate name into the **Macro Title** text box
6. Type the appropriate code into the **Procedure / Service** text box or, click the binoculars to open the procedure / Service Codes window.
7. Type the appropriate code into the **Diagnosis** text box or, click the binoculars to open the Diagnostic Codes window.
8. Click **ok**

The macro will now appear in the **Available Macros** list



Setting a Macro

To attach a billing macro to an appointment

1. Select the patient you wish to attach the billing macro to
2. Right-click and select **Set Macro**
3. Select a macro from the **Available Macros** list
4. Click **Select** to apply the claim macro or, click **Select and Apply** to apply the claim macro and complete the claim. Any changes to the claim previously made will be removed.

When a macro is selected, the details are shown in the field in the right side table. Once an entry in the **Day Sheet** has a macro, it must be approved before the macro will run and bills will be created.

Sending a Message

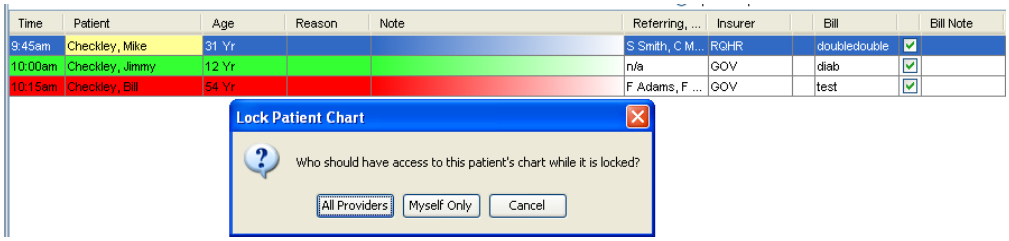
To view the New Followup Message window for a patient from the day sheet

1. Select the patient who the message relates to
2. Right click the patient and select **New Message** from the list

Locking the Chart

To limit access to the patient chart to all providers or the current user from the day sheet

1. Select the patient whose chart you want to lock
2. Right click the patient and select **Lock Chart** from the list
3. Select **All Providers** or **Myself Only** as appropriate



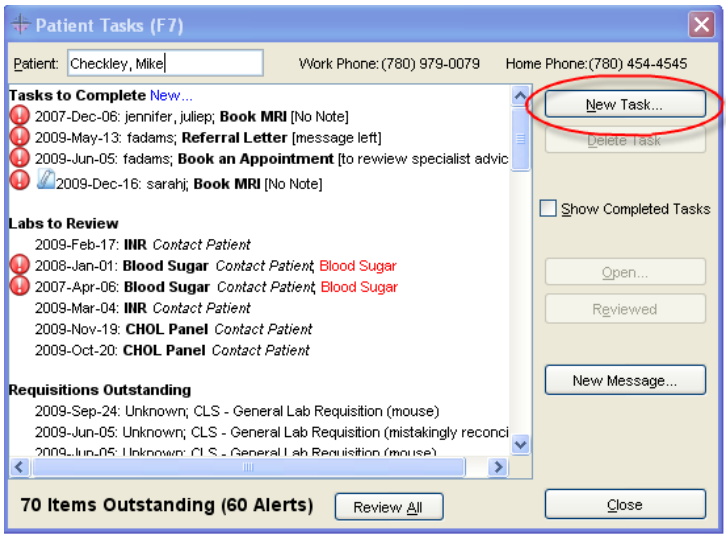
To unlock the patient chart

1. Select the patient whose chart you want to unlock
2. Right click the patient and select **Unlock Chart** from the list
3. Enter your password and select the appropriate reason for unlocking the chart from the list

Adding a Task

To view the Patient Tasks window for a patient from the day sheet

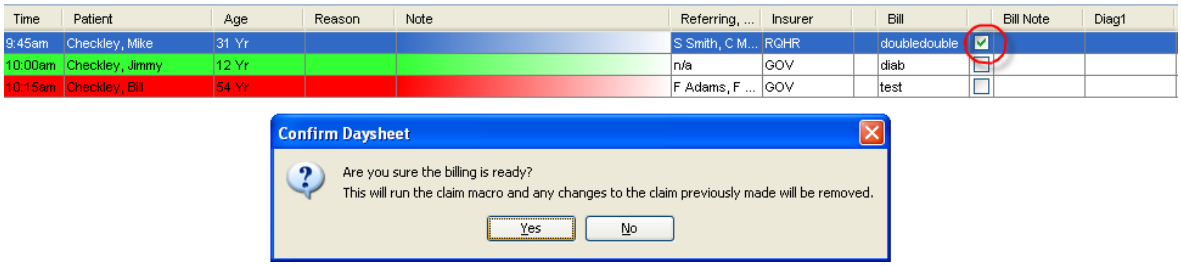
1. Select the patient whose tasks you want to see
2. Right click the patient and select **Add Task** from the list
3. To create a new task click the **New Task** button


Patient Tasks (F7)
Patient: Checkley, Mike
Work Phone:(780) 979-0079
Home Phone:(780) 454-4545
Tasks to Complete New...
2007-Dec-06: jennifer, juliep; Book MRI [No Note]
2009-May-13: fadams; Referral Letter [message left]
2009-Jun-05: fadams; Book an Appointment [to rewiew specialist advic
2009-Dec-16: sarahj; Book MRI [No Note]
Labs to Review
2009-Feb-17: INR Contact Patient
2008-Jan-01: Blood Sugar Contact Patient; Blood Sugar
2007-Apr-06: Blood Sugar Contact Patient; Blood Sugar
2009-Mar-04: INR Contact Patient
2009-Nov-19: CHOL Panel Contact Patient
2009-Oct-20: CHOL Panel Contact Patient
Requisitions Outstanding
2009-Sep-24: Unknown; CLS - General Lab Requisition (mouse)
2009-Jun-05: Unknown; CLS - General Lab Requisition (mistakingly reconci
New Task...
Delete Task
Show Completed Tasks
Open...
Reviewed
New Message...
70 Items Outstanding (60 Alerts)
Review All
Close

Approving a Macro

To approve a macro

1. Select the appointment you want to approve
2. Right-click the appointment
3. Select **Approve**
4. Click **Yes**



The other way to approve a macro is to select the check box to the right of the **Bill** column of the appointment

When the **Day Sheet** entry is approved, the macro will delete any bills that exist for the selected appointment and create new ones according to the macro that was selected. The results can be viewed in the **Claims** section.

To approve all day sheet entries

1. Right-click any appointment
2. Select **Approve All**
3. Click **Yes**

Editing an Appointment and Billing Notes

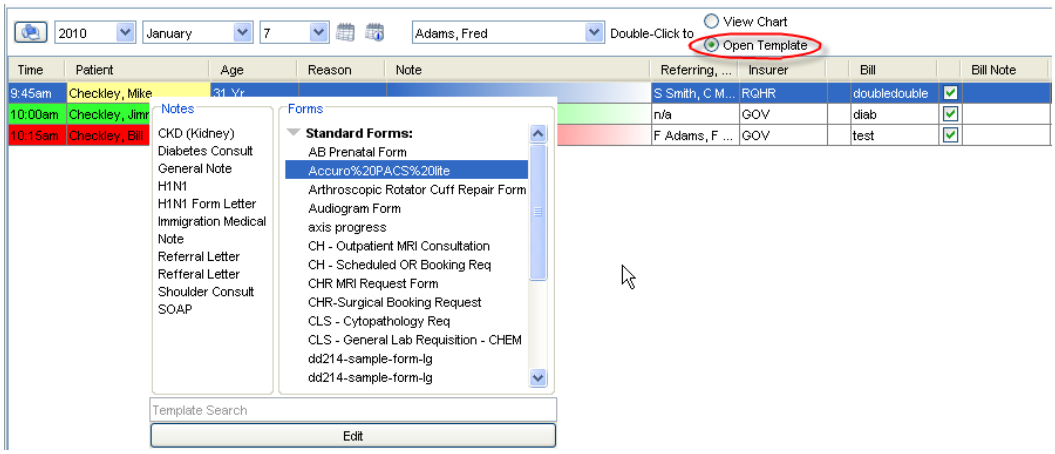
To edit appointment and billing notes on the day sheet

1. Select the note column in the row of the appointment you want to edit
2. Type your note
3. Press **TAB** or click in another field to save your changes

Opening a Template

To open a template from the day sheet

1. Select the **Open Template** radio button
2. Double-click the patient you want to **Open Template** for
3. Point to the template you require
4. Click to **Select**



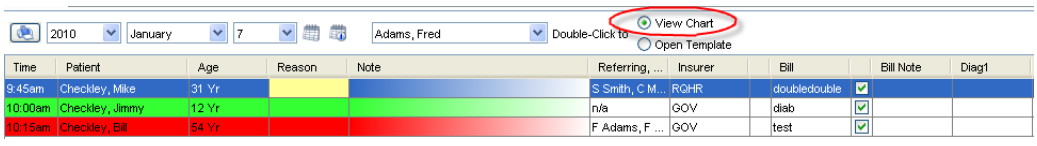
The template will open with patient associated details loaded.

Templates are customizable for each clinic with the **Template Wizard** found in the **Tools** menu.

Viewing the Chart

To view a chart for a patient from the day sheet

1. Select the **View Chart** radio button
2. Double-click the patient you want to **View Chart** for

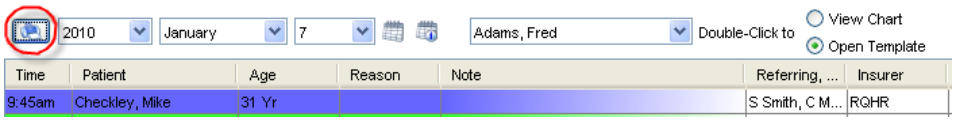


Printing a Day Sheet from the EMR section

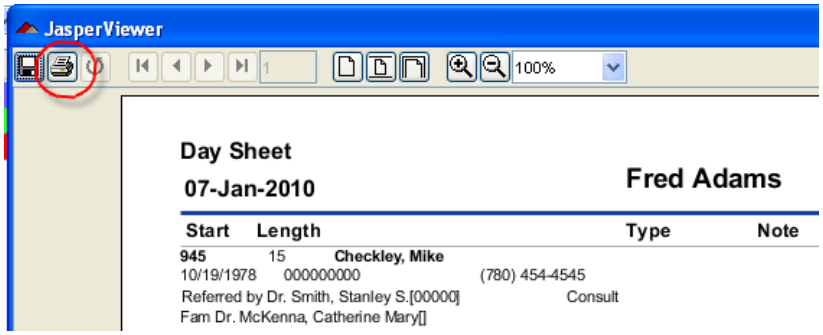
As in the Scheduler, when a hard copy of the schedule for a specific day is needed you can print a Day Sheet.

To print a Day Sheet from the EMR section

1. Select the physician from the **Physician** drop-down list
2. Click the **Print Day Sheet** button



3. A new window will open in the Jasper Viewer with a preview of your Day Sheet
4. Click the **Print** button



You can only print a Day Sheet for the physician that is currently selected in the Physician drop-down list and for the selected day. If you want to print multiple physicians and multiple days you must use the reporting feature.

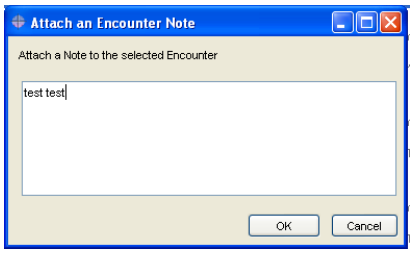
Encounter Notes

Adding Notes to an Encounter Note

Each encounter note can have its own set of notes that can be added at any time, even after the encounter is locked.

To add a note to an encounter note

1. Select the **Encounter Note** you want to add to or amend
2. Right-click the note
3. Select **Attach Note**
4. In the pop window type your note
5. Click **Ok**



To view the notes attached to an encounter note

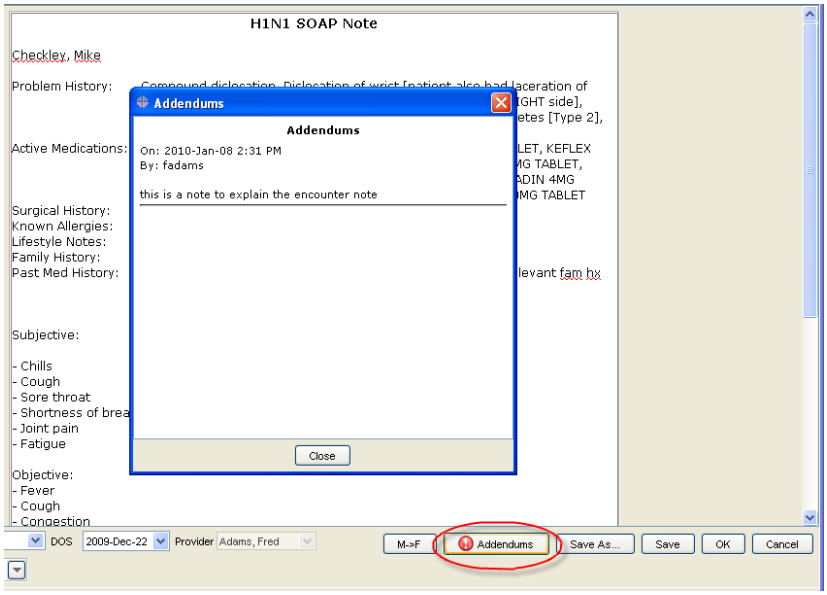
1. Double-click the **Encounter Note** you want to view

The **Encounter Note** will open in a new window

2. If there are notes attached the **Addendums** button will be available.

3. Click **Addendums**

4. When you are finished reviewing your notes click **Close**.



Linking a diagnosis to an encounter note

To attach a diagnosis to an Encounter Note

1. Select the **Encounter Note** you would like to attach a diagnosis to

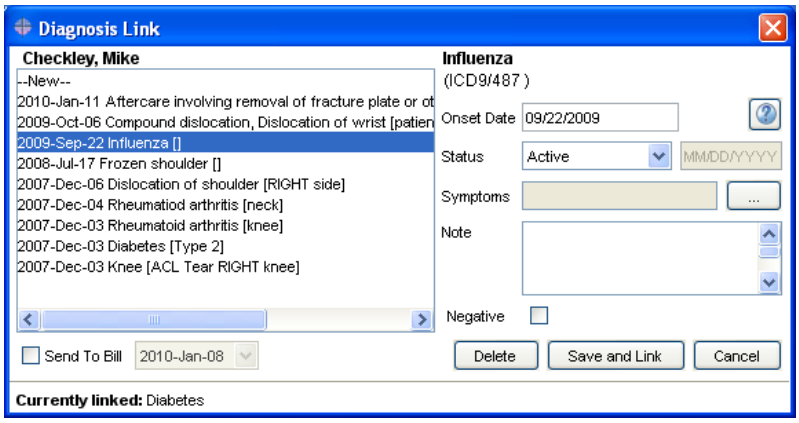
2. Right Click the **Encounter Note** and select **Diagnosis Link**

3. Left Click --**New**—to open the **Diagnostic Search** window

4. Search by Keyword or Code

5. Click **Select and New** to add the diagnosis to your favorites list and continue searching for other diagnoses Click **Select** to choose the diagnosis and go back to the **Diagnosis Link** window

6. Click **Save and Link** to attach the diagnosis and close the window



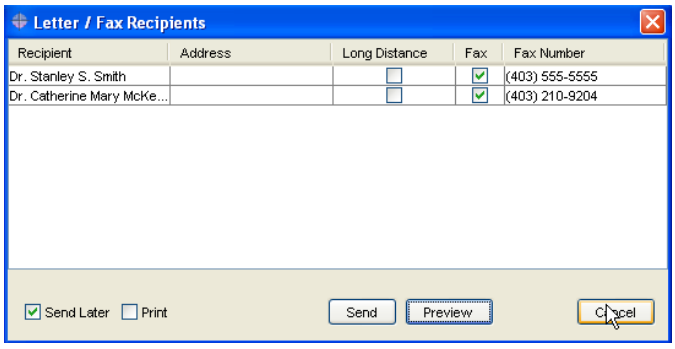
Printing or Faxing Encounter Notes

The faxing components will not show up if your office does not use the faxing functions of Accuro.

Once Encounter notes have been created, they can be either printed or faxed.

To fax an encounter note

1. Select the **Encounter Note** that you want to fax
2. Right-click the note
3. Select **Print/Fax** from the menu
4. Select the **Long Distance** check box if the fax number is not in your local area
5. Select the **Fax** check box
6. Click **Preview** to review your document or click **Send**



To print an encounter note

1. Select the **Encounter Note** that you want to print
2. Right-click the note
3. Select **Print/Fax** from the menu

4. Select the **Print** check box

5. Click **Preview** to review your document or click **Send**

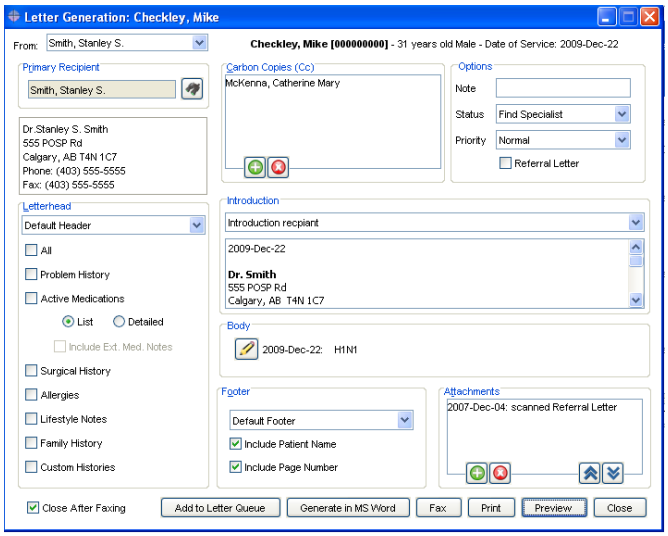
Creating a consult or Referral Letter

This section details how to create and edit consultation and referral letters based on your clinical templates.

There are two ways to create a letter. One method generates a letter from an existing completed template or transcription, and the other generates a blank letter that is stored outside of Accuro or electronically attached to a patients chart through the **Documents Section**.

To create a letter from an encounter note

1. Select the encounter note you want to create a letter for
2. Right-click the note
3. Select **Generate Letter**
4. In the **From:** drop-down list select who the letter is from
5. The referring physician appears as the **Primary Recipient** and their details are in the contact information box
6. To select a different **Primary Recipient** click the **binoculars** to open the **Address Book**
7. If you would like to send copies to other physicians click **Add** in the **Carbon Copies** section
8. Review your Introduction text and type changes if required
9. Click **Edit** if you are using macros and want to change the visible macro
10. Select a check box for each section of information you would like to **Include** in your letter
11. The **Preview** window will show the current content of your letter
12. To attach a document, for example an X-ray, to your letter click **add** in the **Attchments** section
    1. Select the documents you want to attach
    2. Click **Ok**
13. You now can **Print / Fax** your document or click **Generate in MS Word** to export into **MS Word**



MS Word documents will not automatically be saved in Accuro; you must attach them as a document.

All corrections should be made from the **EMR** section and the letter regenerated. Changes made to the body of the letter from the **Letters** section will not save back to the original note.

Sending a Message

To open the New Review Message window from an Encounter Note

1. Select the **Encounter Note** that the message relates to
2. Right click the **Encounter Note** and select **Send Message…** from the list
3. Select a recipient in the **To** section
4. Click **Send** to send message and close the window

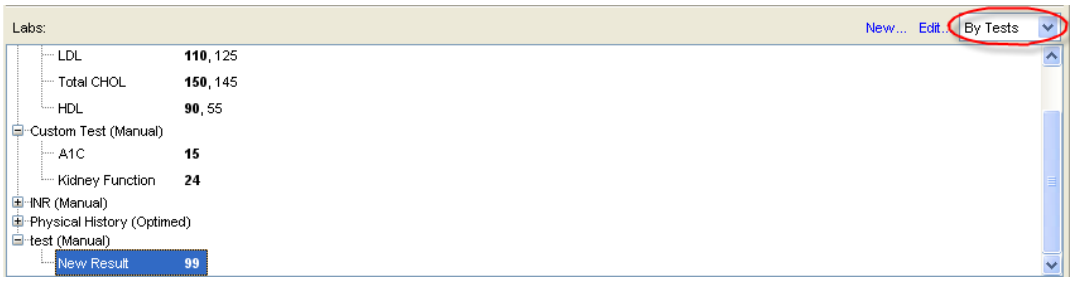
Sending a Task

To open the New Task window for a patient from an Encounter Note

1. ***Select*** the **Encounter Note** that the task relates to
2. Right click the **Encounter Note** and select **Send Task…** from the list
3. Select a recipient in the **To** section
4. Click **Ok** to assign task and close the window

Labs

The **Labs** section of the **Encounter Notes** tab is used for entering manual labs that record observations about a patient's physical state, creating new and editing existing manual labs and for visualizing electronically received labs. It is located in the bottom section of the centre column.



The **Labs** section can be viewed in three ways:

1. By Tests;
2. By Results;
3. By Dates.

Viewing Lab results summary

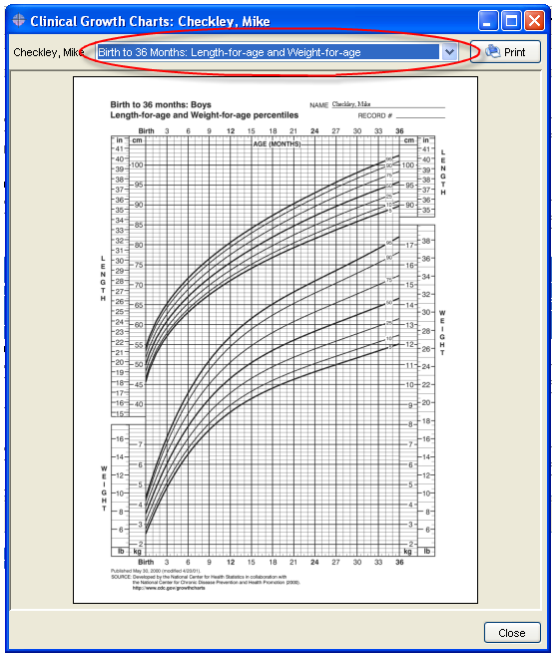
To view a graph of a Lab

1. Right click the **Lab** and select **View Lab Summary**

Viewing Clinical Growth Chart

To view a Clinical Growth Chart

1. Right click the **Lab** and select **Clinical Growth Chart**
2. Select the chart you wish to view from the menu



Viewing a Lab Graph

To view a graph of a Lab

1. Double-Click the Lab you want to view

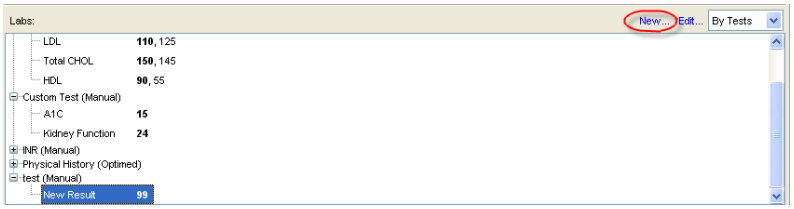
or

2. Right click the **Lab** and select **View Lab Graph**

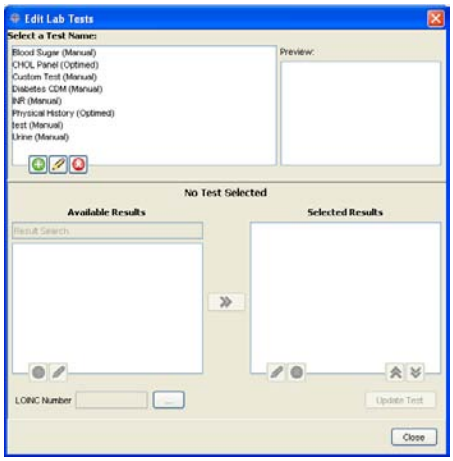
Creating a Manual Lab

To Create a Manual Lab

1. Click the **New** to bring up the **Lab Results Search** window.



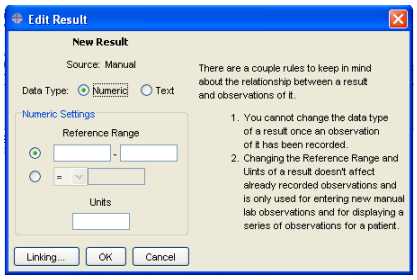
2. Click the **Edit Test** to bring up the **Edit Lab Tests** window.



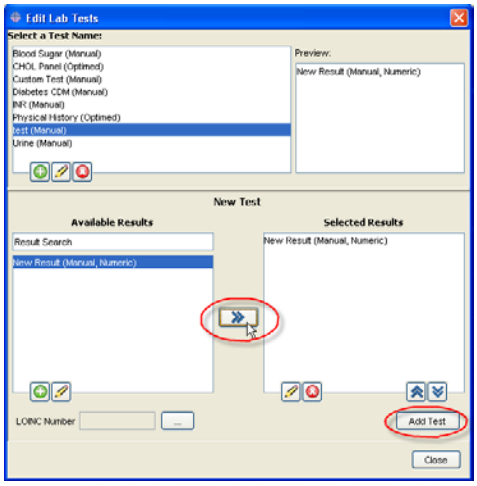
3. Click the **Add** button " " to bring up the **Input** window, this is where you name the new test.

4. Click the **Add** button " " in the **Available Results** box to bring up the **Input** window and name the results that will be associated with this test. Test can have multiple results. Click **Ok**.

5. Edit the reference range and the units of measurement in the **Edit Results** window


Edit Result
New Result
Source: Manual
Data Type: Numeric Text
There are a couple rules to keep in mind about the relationship between a result and observations of it.
Numeric Settings
Reference Range
Units
1. You cannot change the data type of a result once an observation of it has been recorded.
2. Changing the Reference Range and Units of a result doesn't affect already recorded observations and is only used for entering new manual lab observations and for displaying a series of observations for a patient.
Linking...
OK
Cancel

6. Select the results you want from the **Available Results** list and click the chevron to move them to the **Selected Results** list. Click **Add Test**

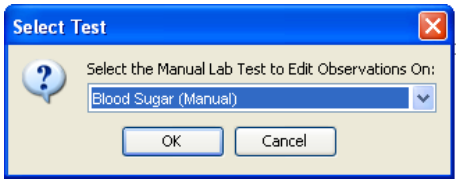


Adding a Manual Lab Result

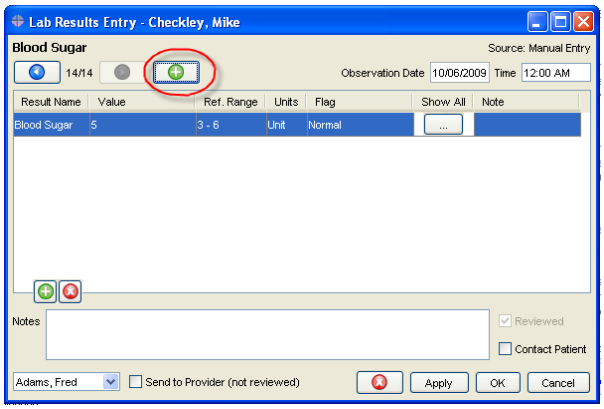
To Add a Manual Lab result

7. Click **Edit** to bring up the **Select Test** window.

8. Select the test from the list and click **Ok**.



9. Click the **Add** button to Enter the lab results into the value column.



10. Click **Apply** to reconcile lab results with an outstanding requisition. Or,

11. Click **Ok**

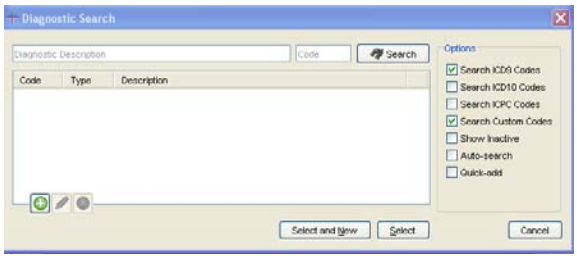
Medical History

Managing History of Problems

The **History of Problems** section of **Medical History** allows you to link a diagnosis to a date of service, add notes on the diagnosis, and sync the information entered with a bill.

To add a problem to the History of Problems list

1. Click the **Add** button " " to bring up the **Diagnosis Search** window

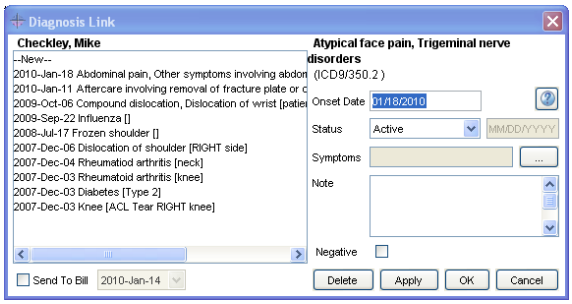


2. Select the database(s) you would like to search in from the **Options** area of the **Diagnosis Search** window

3. Search by a key word or phrase in **Diagnosis Description** or by code in **Code**

4. Click **Select and New** to choose a diagnosis and continue searching for additional diagnoses

5. Click **Select** to choose a diagnosis and proceed to the **Diagnosis Link** window



6. Type a date in the **Onset Date** box, Double-clicking the box will bring up a calendar that you can select the date from

7. Assign a status from the **Status Menu,** the status **Inactive** requires that you enter a date in the date field beside the **Status Menu**

8. Click the "…" button to search ICD9 Codes and add a **Symptom** to the diagnosis

9. Click the free text area beside **Note** to add a note to the diagnosis

10. Click the **Send to Bill** checkbox and select a date of service to update the bill with your changes.

11. Click **Apply** to apply the changes

12. Click **Ok** to confirm the changes and close the window

To edit a problem in the History of Problems list

1. Click the **edit** button " " to open the **Diagnosis Link** window

2. Select the Diagnosis you wish to change from the list on the left

3. Edit the fields that you wish to change

4. Click **Apply** to apply the changes

5. Click **Ok** to confirm the changes and close the window

To Add a Custom Diagnosis

1. Click the **Add** button on the **Diagnosis Search** window to open the **Add Custom Diagnosis** window

2. Enter a custom code and a description

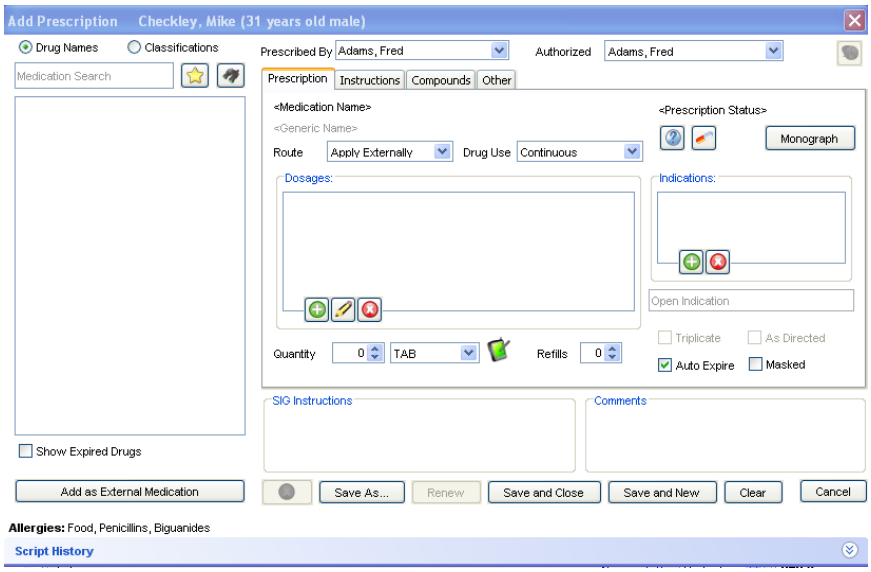
3. Click **Ok**

Managing Active Medications

The **Active Medications** section of **Medical History** allows you to create and manage prescriptions, favorites lists and refills.

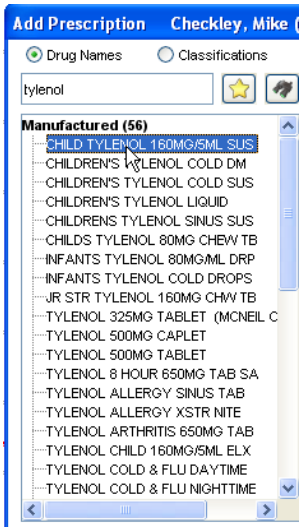
To add a prescription to the Active Medications list

1. Click the **Add** button “ ” to bring up the **Add Prescription** window.

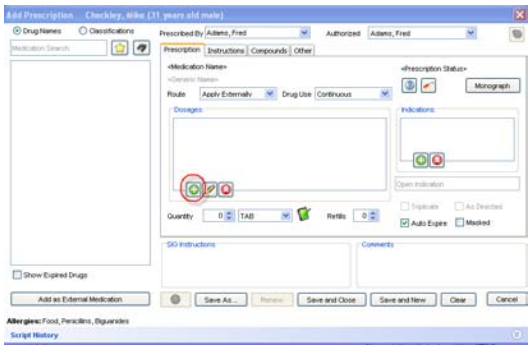


2. Select your search preference , either **Drug Names** or **Classification.**

3. Select the drug you wish to prescribe from the search results.

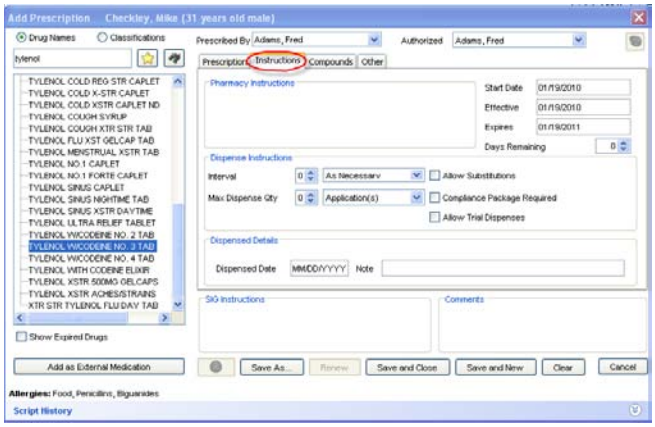


4. Click the **Add button** in **dosages** to open the **Prescription Dosages** window.



5. Adjust the quantities of your prescription.

6. To manage instructions and add dates use the **Instructions** tab.



7. At this point you have a couple of options.

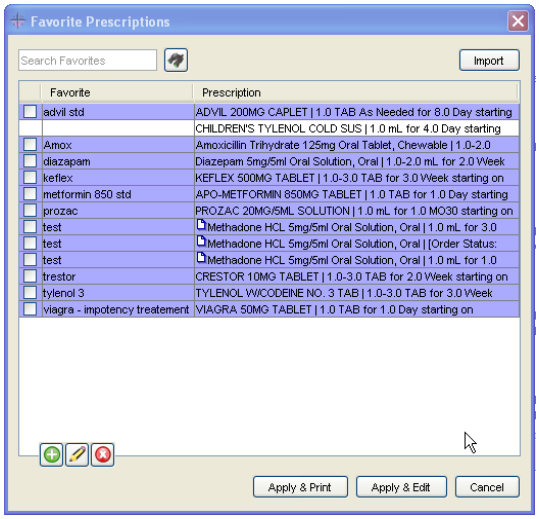
    - Click **Save and Close** to save the prescription, close the window, and open the **Prescription Preview.**

i. Click **Print** or **Fax** as appropriate.

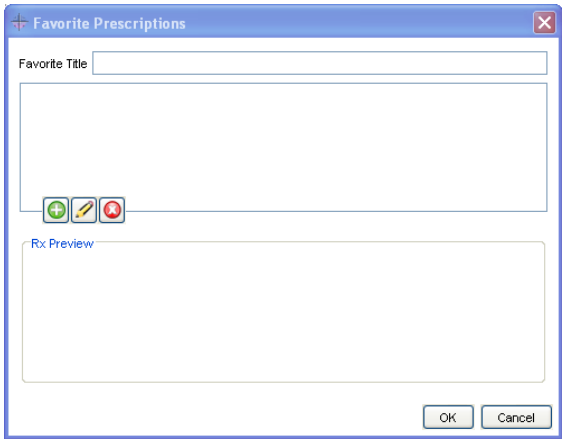
- Click **Save As** to save this prescription as a **Favorite.**
- Click **Save and New** to save you work and add another drug to the prescription.

To add a favorite to the Favorite Prescriptions list

1. Click the **Favorites** button “ ” to bring up the **Favorite Prescriptions** window.


Favorite Prescriptions
Search Favorites
Import
Favorite
Prescription
advil std
ADVIL 200MG CAPLET | 1.0 TAB As Needed for 8.0 Day starting
CHILDREN'S TYLENOL COLD SUS | 1.0 mL for 4.0 Day starting
Amox
Amoxicillin Trihydrate 125mg Oral Tablet, Chewable | 1.0-2.0
diazapam
Diazepam 5mg/5ml Oral Solution, Oral | 1.0-2.0 mL for 2.0 Week
keflex
KEFLEX 500MG TABLET | 1.0-3.0 TAB for 3.0 Week starting on
metformin 850 std
APO-METFORMIN 850MG TABLET | 1.0 TAB for 1.0 Day starting
prozac
PROZAC 20MG/5ML SOLUTION | 1.0 mL for 1.0 MO30 starting on
test
Methadone HCL 5mg/5ml Oral Solution, Oral | 1.0 mL for 3.0
test
Methadone HCL 5mg/5ml Oral Solution, Oral | [Order Status:
test
Methadone HCL 5mg/5ml Oral Solution, Oral | 1.0 mL for 1.0
trestor
CRESTOR 10MG TABLET | 1.0-3.0 TAB for 2.0 Week starting on
tylenol 3
TYLENOL W/CODEINE NO. 3 TAB | 1.0-3.0 TAB for 3.0 Week
viagra - impotency treatement
VIAGRA 50MG TABLET | 1.0 TAB for 1.0 Day starting on
Apply & Print
Apply & Edit
Cancel

2. Click the **Add** button “ ” to bring up the **Add Favorite Prescriptions** window.



3. Enter a title in the **Favorite Title** field.

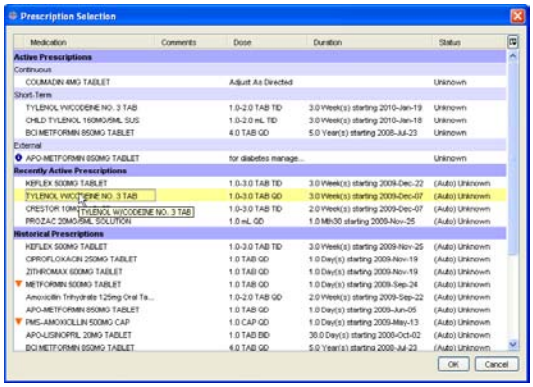
4. Click the **Add** button " " to bring up the **Add Prescription** window.

5. Follow steps 2 – 6 from **Add Prescriptions.**

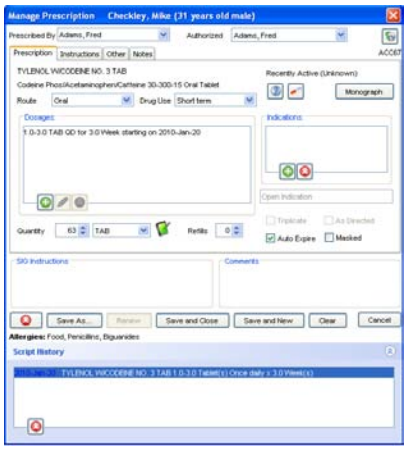
6. Click **Save and New** to add a second medication or, click **Save and Close** to add to prescription to the **Favorites List.**

To manage previously prescribed medication

1. Click the **Manage Prescriptions** button " " to bring up the **Prescription Selection** window.



2. Select the prescription you would like to manage and click **Ok** to bring up the **Manage Prescription** window.



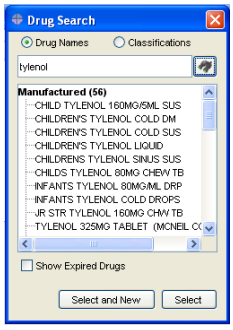
3. Follow steps 5 – 7 from **Add Prescriptions**

Managing External Medications

The **External Medications** section of **Medical History** allows you to add and manage medications prescribed outside the clinic.

To add a prescription to the External Medications list

1. Click the **Add** button " " to bring up the **Drug Search** window.



2. Search for the drug you want to add**.**

3. Click **Select and New** to choose and search for another drug or, **Select** to choose and close the window move to the **Add External Medications** window.

4. Click the add " " or remove " " button to manage the content of the list.

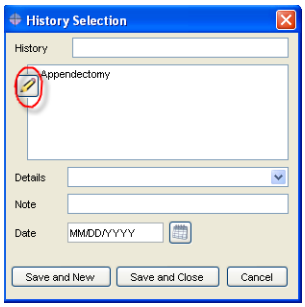
5. Click **Add** to add the prescription to **External Medications** and close the window

Managing Past Surgical History

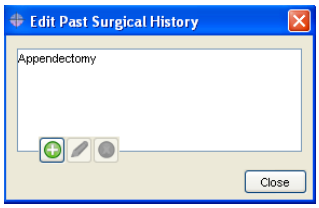
The **Past Surgical History** section of **Medical History** allows you to add and manage a patients surgical history.

To add a Surgery to the Past Surgical History list

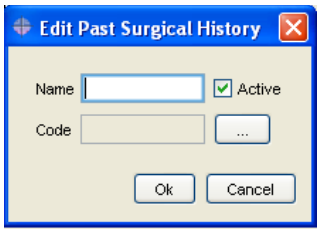
1. Click the **Add** button " " to bring up the **History Selection** window.



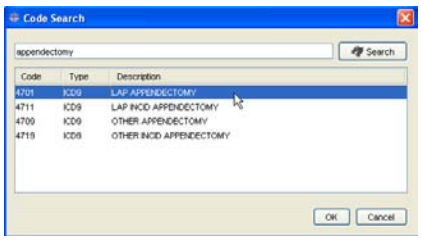
2. Click the **Edit** button to bring up the **Edit Past Surgical History** window**.**



3. Click the add " " button to open the **Edit Past Surgical History** window.



4. Enter a name for the past surgical history and click "…" to open the **Code Search** window search for a diagnostic code.



5. Select a code and click **Ok**

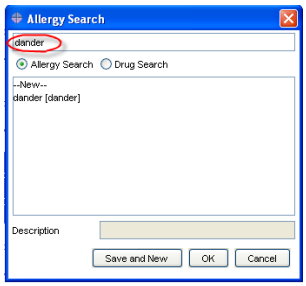
6. The new Past Surgical History will be added to the box seen under step 1. Click **Save and New** to save progress and add another **Surgical History**, or Click **Save and Close** to complete the task.

Managing Allergies

The **Allergies** section of **Medical History** allows you to add and manage a patients allergies.

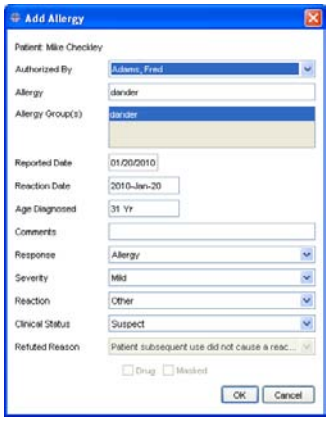
To add an Allergy to the Allergies list

1. Click the **Add** button " " to bring up the **Allergy Search** window.



2. Select **Allergy Search** or **Drug Search.** Search for the allergy in the search box.

3. Select the allergy from the search results and click **Ok** to bring up the **Add Allergy** window.



4. Edit the appropriate fields to describe the allergy.

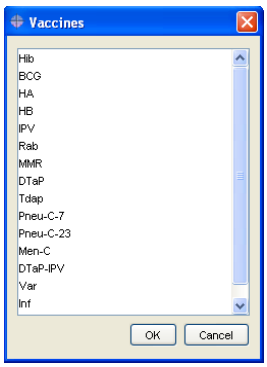
5. Click **Ok** to add the Allergy to the list.

Managing the Immunization Schedule

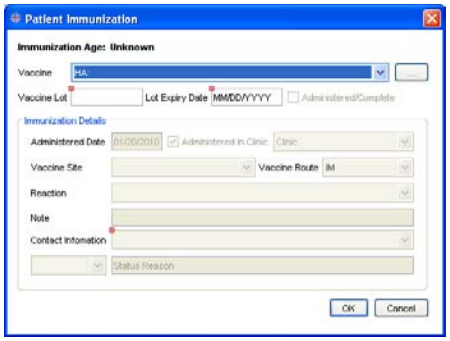
The **Immunization Schedule** section of **Medical History** allows you to add and manage an immunization schedule for a patient.

To add an immunization to the Immunization Schedule list

1. Click the **Add** button " " to bring up the **Vaccines** window.



2. Select **Vaccine** you would like to administer, and then click **Ok** to bring up the **Patient Immunization** window**.**



3. Enter the **Vaccine, Vaccine Lot, Lot Expiry Date** and relevant **Immunization Details**

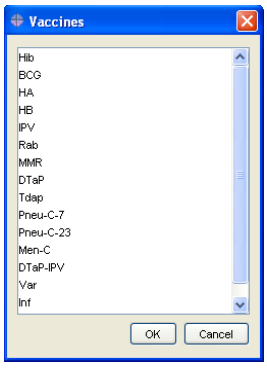
4. Click **Ok** to add the immunization to the **Immunization List**.

Managing the Immunization Summary

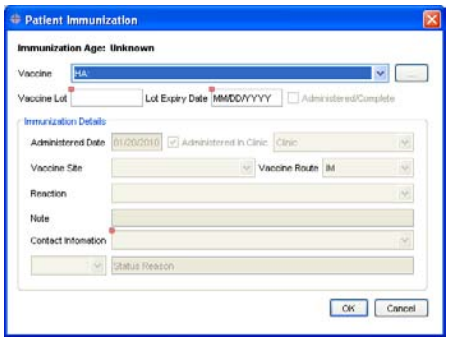
The **Immunization Summary** section of **Medical History** allows you to add to and manage an immunization summary for a patient. The summary allows ad-hoc addition of a Vaccination to a patient and provides a different view, showing only what the patient has already been immunized against, as opposed to the entire Immunization Schedule.

To add an immunization to the Immunization Summary list

1. Click the **Add** button " " to bring up the **Vaccines** window.



2. Select **Vaccine** you would like to administer, and then click **Ok** to bring up the **Patient Immunization** window**.**



3. Enter the **Vaccine, Vaccine Lot, Lot Expiry Date** and relevant **Immunization Details**

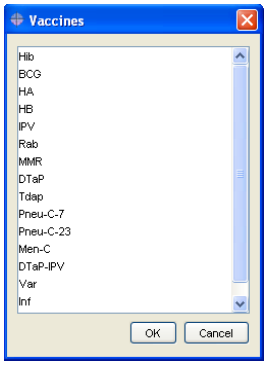
4. Click **Ok** to add the immunization to the **Immunization Summary** list.

Managing Vaccinations

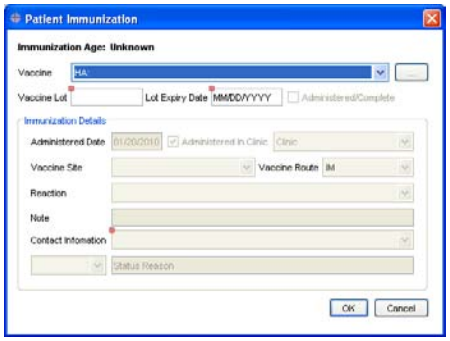
The **Vaccination** section of **Medical History** allows you to add to and manage an immunization summary for a patient. The summary allows ad-hoc addition of a Vaccination to a patient and provides a different view, showing only what the patient has already been immunized against, as opposed to the entire Immunization Schedule.

To add an immunization to the Immunization Summary list

1. Click the **Add** button " " to bring up the **Vaccines** window.



2. Select **Vaccine** you would like to administer, and then click **Ok** to bring up the **Patient Immunization** window**.**



3. Enter the **Vaccine, Vaccine Lot, Lot Expiry Date** and relevant **Immunization Details**

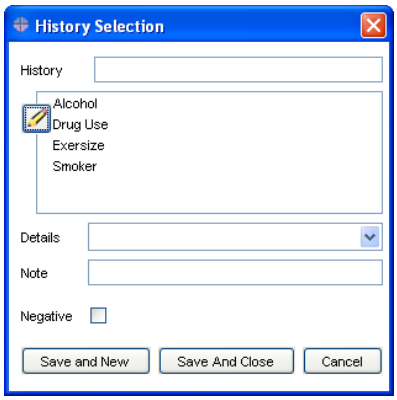
4. Click **Ok** to add the immunization to the **Immunization Summary** list.

Managing Lifestyle

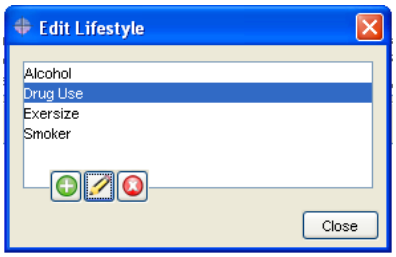
The **Lifestyle** section of **Medical History** allows you to add to and manage a lifestyle factors for a patient.

To add an Lifestyle to the Lifestyle list

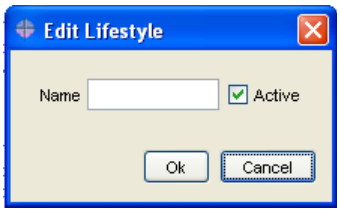
1. Click the **Add** button " " to bring up the **History Selection** window.



2. Click the **Edit** button " " to bring up the **Edit Lifestyle** window.



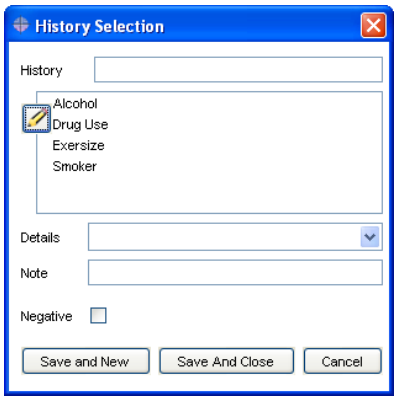
3. Click the **Add** button " " to bring up the **Edit Lifestyle** window.



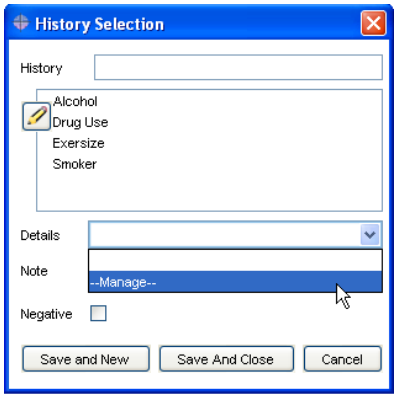
4. Enter a name for the lifestyle factor and Click **Ok**.

To manage the details of a lifestyle factor

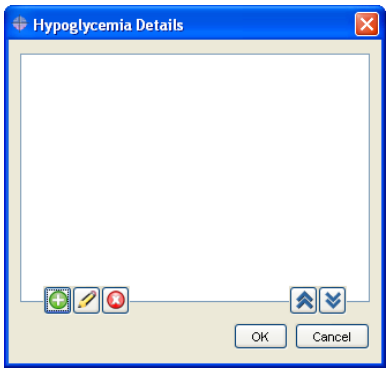
1. Click the **Add** button " " to bring up the **History Selection** window.



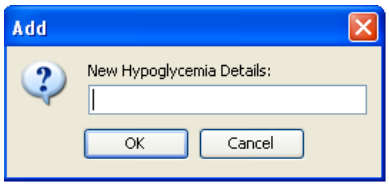
2. Select the condition you would like to manage the details of. Select **Manage** From the **Details** menu list.



3. Click the **Add button** in the condition details window.



4. Type the details into the New Condition Details box, then Click **Ok.**



5. The details will now appear in the Condition details window (screenshot under step 3). Select the details from the list and click **Ok**.

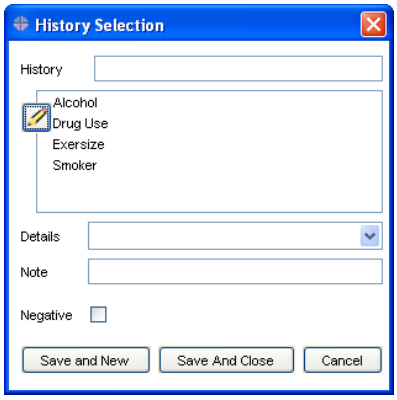
6. The new details will now appear in the details list in the **History Selection** window.

Managing Family History

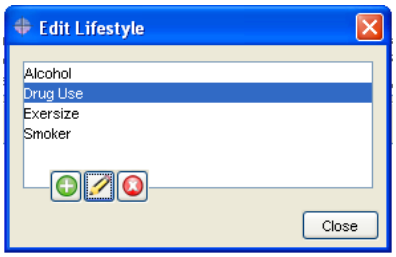
The **Family History** section of **Medical History** allows you to add to and manage Family History factors for a patient.

To add an item to the Family History list

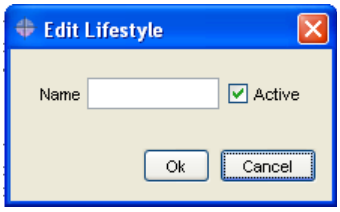
1. Click the **Add** button " " to bring up the **History Selection** window.



2. Click the **Edit** button " " to bring up the **Edit Lifestyle** window.



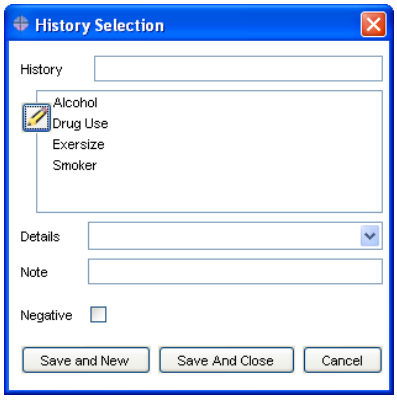
3. Click the **Add** button " " to bring up the **Edit Lifestyle** window.



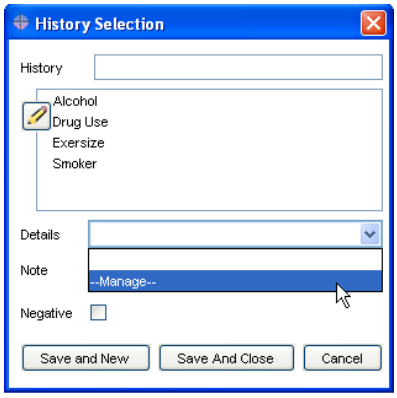
4. Enter a name for the lifestyle factor and Click **Ok**.

To manage the details of a Family History factor

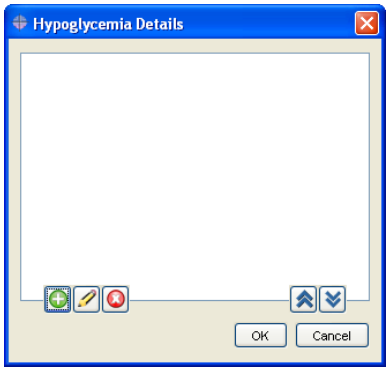
1. Click the **Add** button " " to bring up the **History Selection** window.



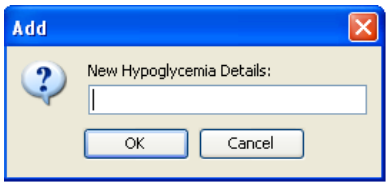
2. Select the condition you would like to manage the details of. Select **Manage** From the **Details** menu list.



3. Click the **Add button** in the condition details window.



4. Type the details into the New Condition Details box, then Click **Ok.**

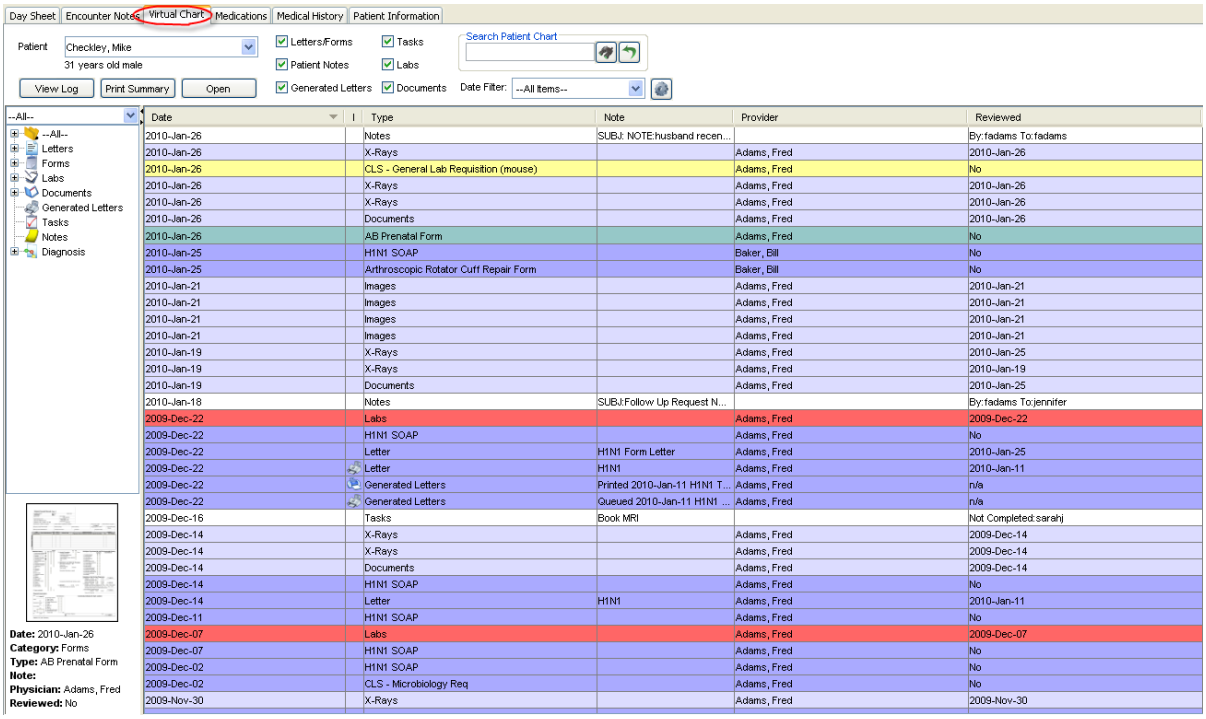


5. The details will now appear in the Condition details window (screenshot under step 3). Select the details from the list and click **Ok**.

6. The new details will now appear in the details list in the **History Selection** window.

Virtual Chart

The **Virtual Chart** tab of the **EMR** section is used to quickly view any item placed on a patients chart. From this tab you can also print the patient chart and view log files. You can **Double-Click** an list item on the chart to view the full document.

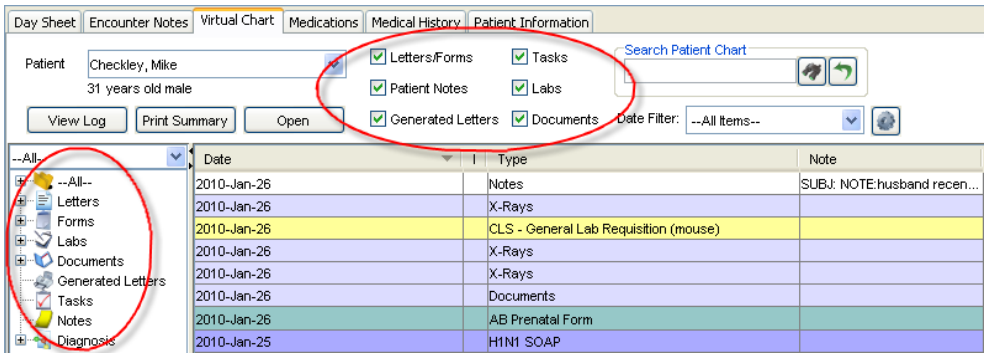


Filtering the Chart

To Filter the Virtual chart By Document type

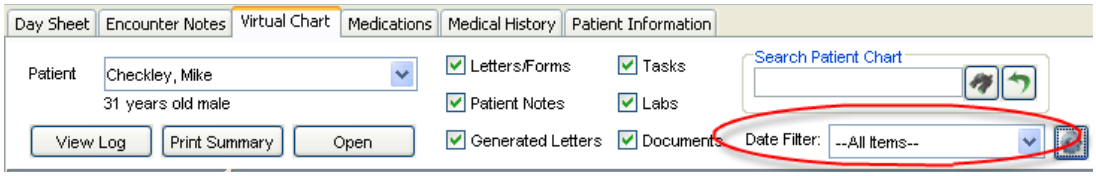
1. Use the document type checkboxes, deselect a type to filter it from the **Virtual Chart,** or

2. Use the file tree menu to select which types you want to view



To Filter the Virtual chart By Date

1. Use the date filter menu to filter the chart based on specific time periods.



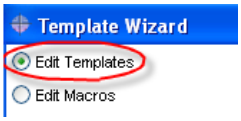
Tools

Template wizard

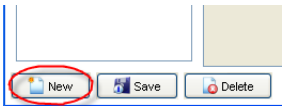
Creating a Template

To create a new template in the Template Wizard

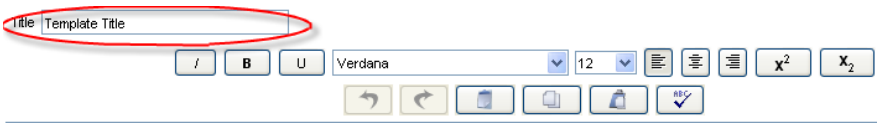
1. Ensure the **Edit Template** radio button is selected



2. Click the **New** button in the bottom left corner



3. Enter a title for your template in the **Title** field.



4. You may now edit the body of the template. The **Template Wizard** is designed to have familiar controls that allow people who have worked with other word processing programs to be quickly

proficient. To learn more about some of the advanced tools you can use within the body of a template please see **Creating Clickable Words** and **Using Tags**

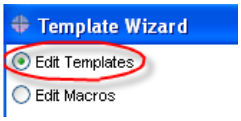
5. Click **Save** in the bottom left corner to save any changes you have made to your template

6. Click **Close** in the bottom right corner to exit the **Template Wizard**

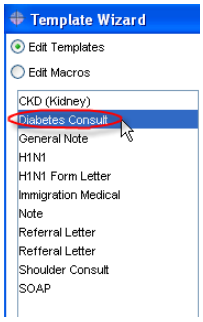
Editing a Template

To edit a template in the Template Wizard

1. Ensure the **Edit Template** radio button is selected



2. Select a template from the list of templates on the left



3. You may now edit the body of the template. The **Template Wizard** is designed to have familiar controls that allow people who have worked with other word processing programs to be quickly proficient. To learn more about some of the advanced tools you can use within the body of a template please see **Creating Clickable Words** and **Using Tags**

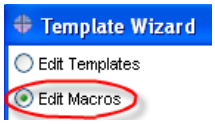
4. Click **Save** in the bottom left corner to save any changes you have made to your template

5. Click **Close** in the bottom right corner to exit the **Template Wizard**

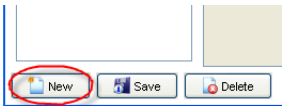
Creating a Macro

To create a new Macro in the Template Wizard

1. Ensure the **Edit Macros** radio button is selected



2. Click the **New** button in the bottom left corner



3. Enter a title for your Macro in the **Title** field.

4. You may now edit the body of the macro. To learn more about some of the advanced tools you can use within the body of a Macro please see **Creating Clickable Words**

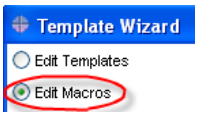
5. Click **Save** in the bottom left corner to save any changes you have made to your Macro

6. Click **Close** in the bottom right corner to exit the **Template Wizard**

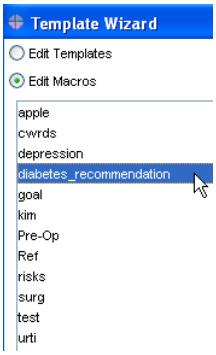
Editing a Macro

To edit a Macro in the Template Wizard

1. Ensure the **Edit Macro** radio button is selected



2. Select a Macro from the list of templates on the left



3. You may now edit the body of the Macro. To learn more about some of the advanced tools you can use within the body of a template please see **Creating Clickable Words**

4. Click **Save** in the bottom left corner to save any changes you have made to your Macro

5. Click **Close** in the bottom right corner to exit the **Template Wizard**

Creating Clickable Words

Clickable Words are a tool we have created to help cut down on the amount of time it takes to complete a template and to reduce the amount of time spent typing. **Clickable Words** look like this on the screen:

[option1|option2|option3|option4]

To Create Clickable Words

You can create **Clickable Words** within **Macros** or **Templates** wherever there are variables that you would like to use a mouse or tablet pen to select. To Create the list separate your options with a "Pipe |" and enclose your entire list in "Square brackets [ ]". Accuro will turn your symbols blue, indicating that it has successfully recognized your list.

1. Open with a left square bracket "["
2. Write in your variable
3. Separate with a pipe, this is the SHIFT +
4. Write in the next variable
5. Repeat steps 3 and 4 as necessary
6. Close with a right square bracket "]"

To Use Clickable Words

If you only want to select one variable

- Double-click the variable you with to select

All other options with disappear

If you want to select multiple variables

1. Click the variables you wish to select, this will highlight them in yellow
2. Double-click any of the highlighted variables

Accuro will automatically separate variables with a comma and insert an "and" between the last two variables to help create grammatically correct sentences. This is a feature of the square bracket. To create **Clickable Words** without punctuation substitute the square brackets for curly brackets "{}"

To Create Clickable Words without punctuation

Clickable Words without punctuation are useful for creating lists which can look like this

{-option1|
-option2|
-option3|
-option4}

1. Open with a left curly bracket "{"
2. Write in your variable
3. Separate with a pipe, this is the SHIFT +
4. Write in the next variable
5. Repeat steps 3 and 4 as necessary
6. Close with a right curly bracket "}"

Once selected your list will look like this

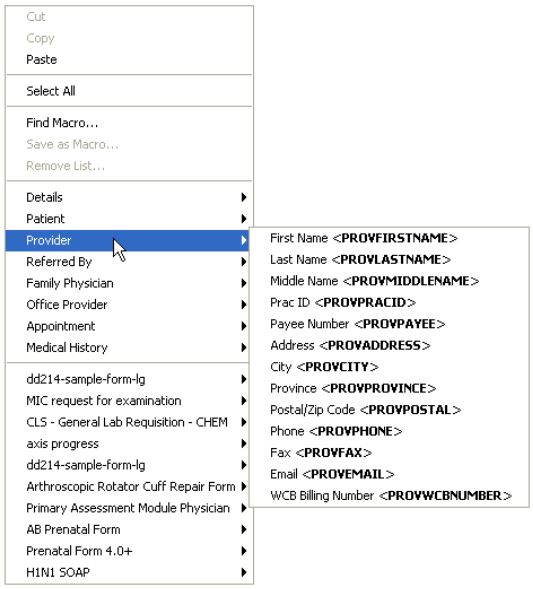
-option1
-option3
-option4

Managing Tags

Tags are a tool we have created to help cut down on the amount of time it takes to complete a template and to reduce the amount of time spent typing. **Tags** take information from the patient chart and pull it in to the template.

To use Tags

1. Right Click in the body of a template
2. The bottom two sections contain your tags



3. Select a category by hovering your mouse over the list item

4. Select your tag from the list on the right

5. The tag will appear in your template wherever your cursor was resting

All clinics will have their Accuro preloaded with the tag categories in the second section from the bottom. The bottom section contains **Custom Tags**. These can be created in a few sections of Accuro including **Patients** and the **Form Editor**. If you have questions about custom tags please contact our support department

Managing Legacy Templates

Legacy Templates are used by some Customers who began using an early version of Accuro. This section is not intended for use by newer customers. If you have any questions about **Legacy Templates** please contact out support department.

Form Editor

Introduction

Forms are defined templates and can be used to create your own data entry screens for patients. This could include the creation of Lab requisitions, OR booking forms, administrative forms, clinical templates for consultation/follow-up, chronic disease management, pain drawings, and so on. Forms are part of the patient's electronic medical record, providing data input formats specific to each physician, while maintaining data integrity.

Create forms to both save time, and increase the effectiveness of your data collection.

Some definitions are important to know before reading this instruction set.

Definitions

Form: Defined as a screen containing added components and elements. A form is opened from a drop-down list within the **Encounter Notes** tab of the **EMR** section.

Element: An element is an item that could appear on a form. Types of elements include: a text box, a label, a drop-down list, a spreadsheet, a check box, and so on.

Component: A component is a single grouping of element(s) within a form. Only components can be added to a form and a component must contain at least one element. The purpose of a component is to manage the grouping of elements. Components are listed in the form editor for application to a form. Once on the form, they show up with a light blue border on the screen.

Form Management Buttons

Create a new form

Open the selected form

Save changes to the form

Delete the selected form

Bind forms together to make a multi-page form

Publish the selected form for use by others or download forms published by others

Export form to file

Import form from file

Form Management

Creating a new form

To create a new form

1. In the **Tools** menu, select **Form Editor**
2. In the form editor window select **Create a New Form**
3. The **New Accuro Form** window will appear
4. By default **Blank Form** is selected and you can click **Create** to continue

The form is now ready to add components.

Adding Components to a Form

A form is simply a blank canvas until components are added. Components can be selected from the left side of the screen, and are organized under heading categories.

To add a background or watermark to the form

1. Drag the component called **Watermark** onto the form
2. Right-click on the small pinkish square that will appear in the top left hand corner of the form
3. Select **Edit**, this will bring up the **Component Editor** window
4. Using the **…** button beside the background field search your system for the background you want to pull onto your form.
5. Select it and click **Open**
6. Clicking the **Resize** button will resize the documents' DPI to the correct resolution as well as add the printer background in its correct resolution
7. Click **OK**

To add components to a form

1. Double-click one of the categories in the left side panel
2. Select the component that you want to add to your form
3. Drag the component on to the form to the position of choice

Components can be dragged again if required. The component will appear on the form outlined with a light blue border

To copy a component on your form hold the **CTRL** key down while you click and drag the component to its next desired location

To edit components in a form

1. Right-click the component that you want to edit
2. Select **Edit**
3. In the **Component Elements** section:
4. **Edit** an element - This screen will be different for each of the **Types of Elements**.
5. **Remove** an element - Select the element and click **Remove**
6. **Add** an element - Click **Add** to open a drop-down list showing the **Types of Elements** available for selection

Repeat until you have all the necessary elements

To delete components in a form

1. Right-click the component that you want to delete
2. Select **Remove**
3. Click **Yes**

Types of Elements and Usage

Query Element

Use: For adding an existing database field to a component (for adding to a form).

Queries can be found in the following categories:

- Appointment
- Patient
- Physician
- Referring physician
- EMR

Options: The font can be changed.

Examples: Adding a patient first name and a patient last name to a form in the same component gives the full name as a component on the form that can be positioned accordingly.

Combo Box

Use: For use when the desired output is for the form to show a list of selectable options, and exactly one option can be selected. This is otherwise known as a drop-down box, selection box, or pick list.

Options: The contents of the combo box are modifiable, and the font can be changed.

Examples: Adding a drop-down list for the patient's marital status. Adding a drop-down list for the selection of a pain score or response to a closed ended question.

Check Box

Use: For use when there intent is for a "yes or no", "true or false" selection on the form. The default can be selected or cleared, but these are the only two options. For "yes", "no", or "not evaluated", use a combo box.

Options: The name of the check box (text label) can be entered. The size (regular or "small icon") can be changed. A value group and value can be assigned in order to create a scoring system on the form. With scoring assigned, when the option is selected, the value will be added to the value group on the form.

Examples: To list a number of options where you can select any option that applies. This would entail creating a check box for each item and adding them to a single component. (Select the vertical alignment button to stack the items vertically within the component)

Radio Button

Use: For use when the desired output is for the form to show a list of selectable options, and exactly one option can be selected. All items in the list are visible at all times, but only one is allowed selection. When selecting an item, it clears the previously selected item.

Options: When creating a radio button set, all items must have the same name for consideration as a "group". This can be set in the edit screen of the elements.

Examples: Anytime a combo box is appropriate, all options must be visible without having to open them. Also, all options print out with the selected option indicated on the screen and printout

Label

Use: For text on screen, like a title for the form, or instruction.

Options: Font size and text contents. Font size can be selected by clicking the font button in the edit screen, and the text can be changed either in the edit screen, or by double-clicking the element directly on the form.

Examples: When a title is required for the form or to label a component, element, or even provide spacing by creating a label within a component, where the label is simply a few spaces.

Text Box

Use: for use when a limited amount of text input is desired.

Options: Font size, default text, and width of the box. Font size can be selected by clicking the font button in the edit screen, and the text can be changed in the edit screen as well. The width of the box is shown in "number of columns". Change this number, and then click save element to see the change on the form.

Examples: Asking for the input of anything that the database does not contain. When the form prints, the text within the text box prints, and the box around the text does not print.

Text Area

Use: For use when a larger amount of text input is desired.

Options: Font size, default text, height of the box, and width of the box. Font size can be selected by clicking the font button in the edit screen, and the text can be changed in the edit screen as well. The height and width of the box is shown in "number of rows" and "number of columns", respectively. Change these numbers, and then click save element to see the change on the form. The other option is to hide a border around the text area. To hide, select the hide border check box in the edit screen.

Examples: Asking for the input of anything that the database does not contain, like a notes section on a form. When the form prints, the text within the text box prints, and the box around the text only prints if the hide border option is cleared.

List Box

Use: For use when multiple selections are required where all the results are required to fit in a list that scrolls as it grows.

Options: The contents, or items, within the list box. This is done from the edit screen, similar to modifying the contents of the combo box.

Examples: A list of insurers on the screen to select the all that apply to the patient.

Image

Use: For creating an image to draw over for clinical purposes.

Options: The image is the main option, and the size. Open the image details, click the ... (three dots) button to select the image in the edit screen of the image element.

Examples: Area of injury drawings for representing body parts with injury locations.

Background Image (Watermark)

Use: For creating form where the background of the form is the image of a scanned paper form (for example, a Lab Requisition, or Surgical Booking Form).

Options: The "Background" is the only option with watermarks. Click the "..." button, on the right side of the Background text box, then browse to the scanned file on the machine. See adding a background or watermark for further information.

Examples: Lab requisitions, OR Booking Forms, Insurance Forms, and so on.

Copying an Existing Form

To copy an existing form

1. In the **Tools** menu, select **Form Editor**
2. In the form editor window select **Create a New Form**
3. The **New Accuro Form** window will appear
4. Select **Copy Existing Form**
5. Select the form to copy
6. Click **Create**

The form is now ready to add components.

Creating a Multi-Page Form

To create a multi-page form

1. Create each individual page as a separate form
2. Once all the pages have been created, click **Bind Forms**
3. In the **Form Binding** window, select the first page of your form from the **Available Forms** list
4. Click **Bind**
5. Repeat until all the desired pages are listed under **Current Pages**
6. Change the order of the pages as required by selecting the page and using the up or down arrows
7. Click **Save**

Note: When you bind a form, it appears as the title of its first page, and the subsequent pages will no longer be separate forms unless they are unbound. This window is also used to unbind forms if required.

Form Publisher

Forms can be shared with other clinics through the Optimed Software Corporation servers. Click the **Form Publisher** to access the forms directory.

Downloading a Published Form

To download a published form

1. Select the form you want to download from the **Published Forms** list in the **Form Publisher** window
2. Click **Download**
3. Click **Close** to exit

The form will now appear in **Your Forms** list and be available for use. You can filter the available forms by **Category** and / or **Author** by selecting the filter from the appropriate drop-down list

Publishing Forms

Before you can publish forms to the directory, you are required to login, or register if it is your first time using the **Form Publisher**. The **User name** and **Password** that you use for publishing forms can be different from your Accuro login.

The **User name** will be used as the **Author** name when published

To publish a form

1. In the **Form Publisher** window, select the form that you want to publish from **Your Forms** list
2. Select the appropriate **Category** for your form
3. Type a description of your form in the **Description** text box
4. Click **Publish**
5. Click **Close** to exit

The form will now appear in the **Published Forms** list

Using a Form

Using a form in encounter notes

To use a form

1. Load the global patient that you will be using the form for
2. In the **EMR** section, select the **Encounter Notes** tab
3. In the **Clinical Notes** section, select the form from the templates dropdown list or use the available search tool
4. Click on the title of the form you want to open.

The form opens on the screen for completion.

Using form functions

The following are functions that can be used in a form.

Drawing

To enable drawing: Click the Pencil button and it will turn in to a hand inside of a red stop sign. Drawing is now enabled and marks are made on the form when you drag the pointer around the form. For tablets, contact to the screen by the pen creates the markings.

To change colors

Click the colored square (black by default) and select a color using the Color Palette.

To change the thickness

Enter a number in the thickness box (1 by default), 25 is the thickest setting and 1 is the thinnest.

To change the type of marking

Select the appropriate button for the type of marking that you want.

Pen

The pen setting is the most common and the default setting. It simply marks the screen as a solid marking in the thickness and color specified.

Highlighter

The highlighter setting draws only straight lines in the thickness and (diluted) color selected. Drag the pointer to create the line.

Rectangle

The rectangle setting draws a solid box, filled with the color selected (or erase if the erase check box is also selected).

Erase (Check box)

The erase setting adopts the pen or rectangle shape, but removes any image background behind the markings. Its purpose is mainly for scanned forms to remove background noise or to essentially "white out" parts of the form. Components can be overlaid on the erased areas and appear on top.

Flipping Pages

To navigate through pages, click the previous page **(<<)** and next page **(>>)** buttons surrounding the page number at the top of the form.

Saving a Form

To save a form, click **Save,** or close the form and select **Yes** to the **Save Changes** warning that appears.

Versions

Each time a form is saved a new version is created. The version number shows at the top of the form. Click the **(<<)** button to view previous versions. Click the **(>>)** button to view recent versions. Clicking **Save** on an older version will create a new version that matches the older version, but will maintain the versions in between. The purpose to versions is to maintain the security of electronic note taking.

Printing a Form

To print a form, click Print. A print window for the default printer on the computer will open.

Refreshing the fields on a form

To refresh the database fields (like patient birth date, or medications list), click the double arrow icon

Posting a Form Online

To post a form online, click **Offline**. Once online, the button will change to say **Online**. This will now flag the form so that when a patient accesses Accuro in the network (with their user name=PHN and their password=Birth date), the form will be in the list for the patient to complete. Note: PHN must contain no spaces. Birth date must be in the format MM/DD/YYYY, for example, 10/25/1978.

Attaching the form to a Date Of Service

To assign the form to a **Date of Service**, confirm that the appointment is selected from the left side appointments column within the **Encounter Notes** tab within the **EMR** before opening the form.

Note: If the form is opened and saved already, there is a drop-down box in the upper-left corner of the form that contains an appointment listing for the patient. Selecting an appointment from the list, then saving the form will assign the form the selected appointment/date of Service.

Deleting a Form

To delete a form

1. In the **Form Editor**, select the form that you want to delete from the Forms list
2. Click **Delete the Form**
3. Click **Yes** to confirm

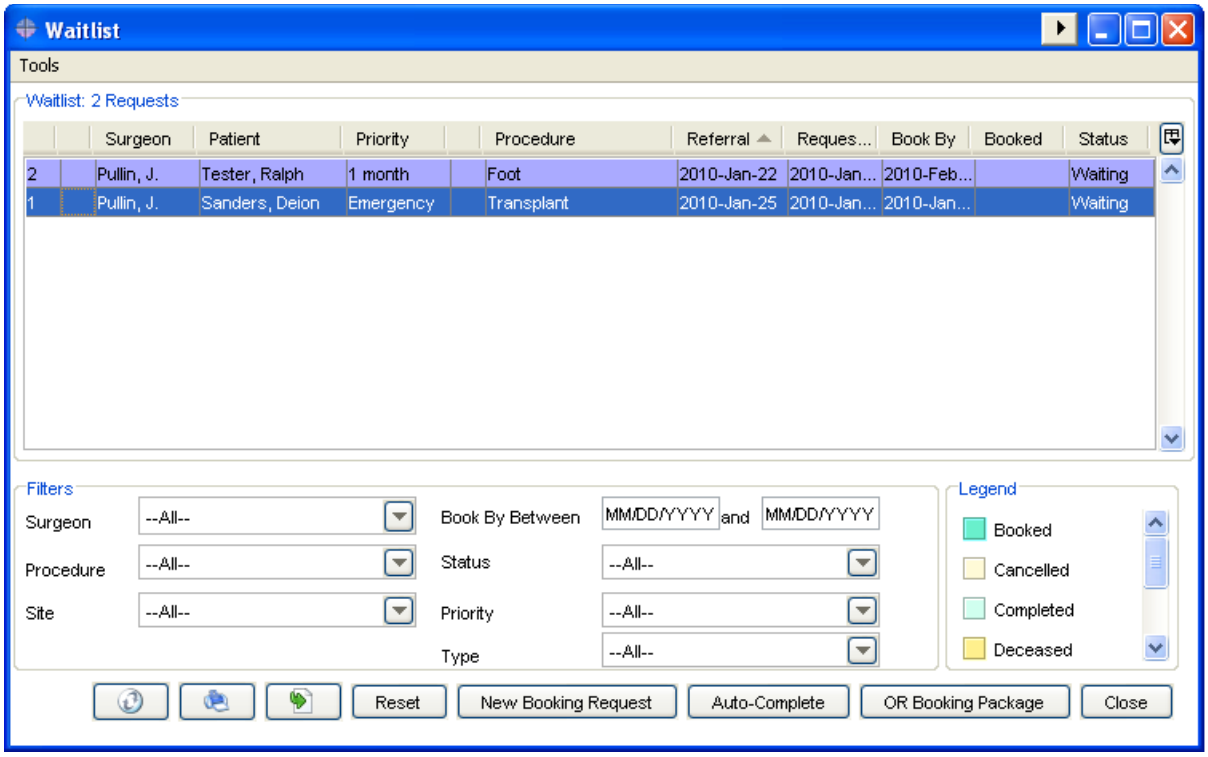
The form is now deleted from the list. Any forms in use for a patient cannot be permanently deleted.

WAITLIST

The **Waitlist** section is a flexible way to track patients that may require an earlier date than is available in the Scheduler for surgery or other appointment types.

Main Window

The main window displays a summary of the patients waiting for scheduling.



From here you can filter the booking list, create new booking requests, or complete a booking.

Filtering the Booking List

To filter the booking list

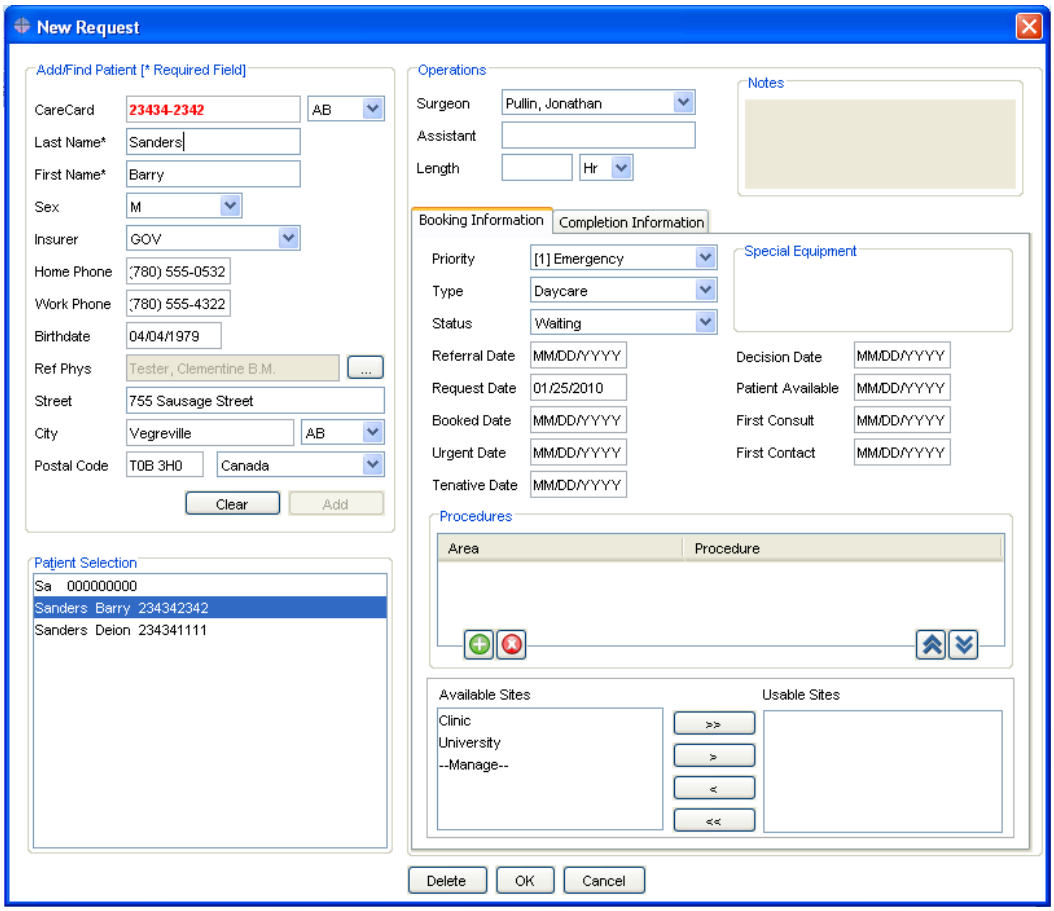
1. Own list for the type of date you wish to narrow your results to, for example **Surgeon**, **Procedure**, **Status**, **Site**, or **Book By** date. Only the bookings that meet the requirements of your filter will appear.

2. To cancel a filter, select **All** from the drop-down list of the active filter. To cancel all filters, click the **Reset** button.

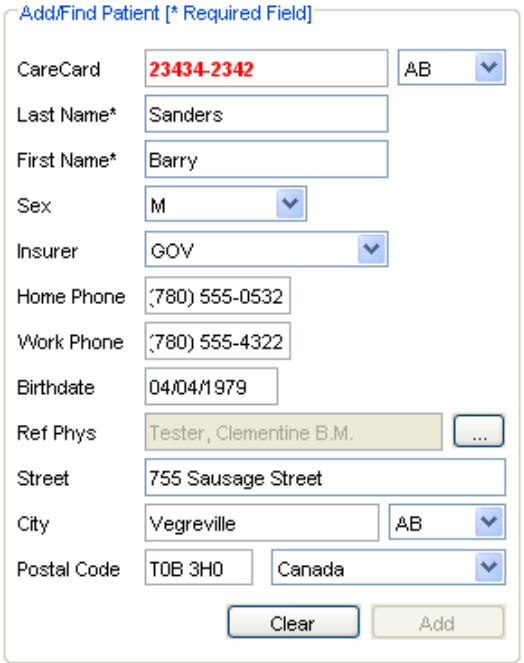
Creating a New Booking Request

To create a new booking request

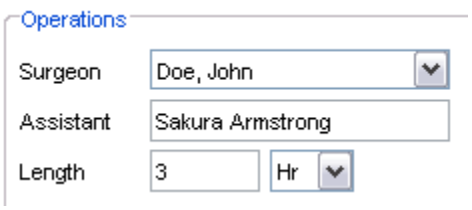
1. Click the **New Booking Request** button. This will open the **New Request** dialog.



2. Use the **Patient Search Tool** to load a patient. If the patient is not in Accuro, fill out the patient information and click **Add** to add them.



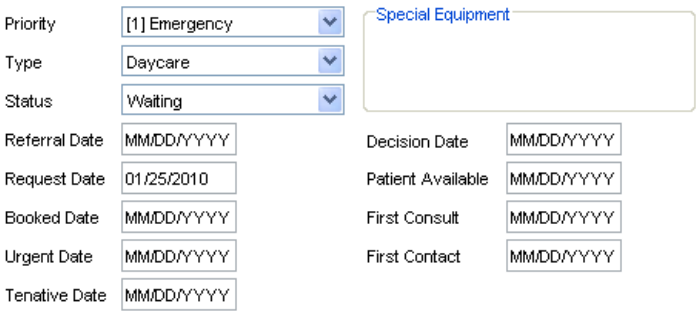
3. Select a **Surgeon** from the drop-down list in the **Operations** section.



4. Type the name of any **Assistants** if required.

5. Type in the estimated **Length** of the surgery if required.

6. In the **Booking Information** tab:



- Select the **Priority** level.
- Select the **Type** of booking.
- Select a **Status** from the drop-down list.
- Select a **Referral Date**, **Request Date, Booked Date**, **Urgent Date**, **Tentative Date**, **Decision Date**, **Patient Available Date**, **First Consult** and **First Contact Date** using the popup calendars.

7. Enter the associated **Procedures** with the operation:

To add a procedure

1. Click the **Add** button. This will open the Select Procedure dialog.
2. Select the **Body Area** from the drop-down list.
3. Select the **Procedure** from the drop-down list.
   - Click the button beside **Procedure** to search on a list of procedures.
4. Click **Add**.

To remove a procedure

1. Click on a procedure to select it.

2. Click the **Remove** button .
3. Select a **Usable Site** by clicking on it and clicking the arrow button.
4. More than one **Usable Site** can be selected by holding the CTRL button.
5. Click **OK**.

Matching Appointments to the Waitlist

Accuro will notify you when you create an appointment for a patient who is on the **Waitlist**.

A window will appear and ask you if you want to book from the waitlist, if this is the correct reason for the appointment then select the appropriate procedure from the drop-down list and click **Ok**.

The **Scheduler** will now show the booking.

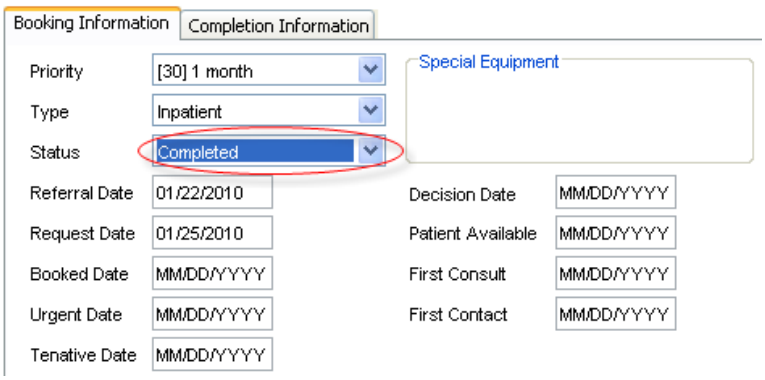
If the appointment is for a different reason then click **Cancel** and the **Scheduler** will only show your original information from the **Appointment Details**.

Showing a Completed Booking

It is a good idea to change the status of the **Waitlist Booking** to completed after you have booked the surgery.

To show a completed booking

1. Double-click on the booking that has been completed to open the **Edit Request** dialog.
2. Select **Complete** from the **Status** drop-down list.



3. If you have created a **Completed Information** template switch to that tab and fill out the completion details.
4. Click **Save**.

Other Functions

There are several other buttons along the bottom of the **Waitlist**.

Refresh – Click the **Refresh** button to show any changes that have been made since the **Waitlist** was opened.

Print – Click the **Print** button to generate a document showing the currently filtered list of requests.

Export to CSV File – Click the **Export** button to generate a CSV file from the **Waitlist**.

Auto-Complete – Click the **Auto-Complete** button to change all booking requests in the past to completed status.

OR Booking Package – Click the **OR Booking Package** button to attach a **Booking Form** and an **Assessment Form** to the patient's **Virtual Chart**.

Waitlist Configuration

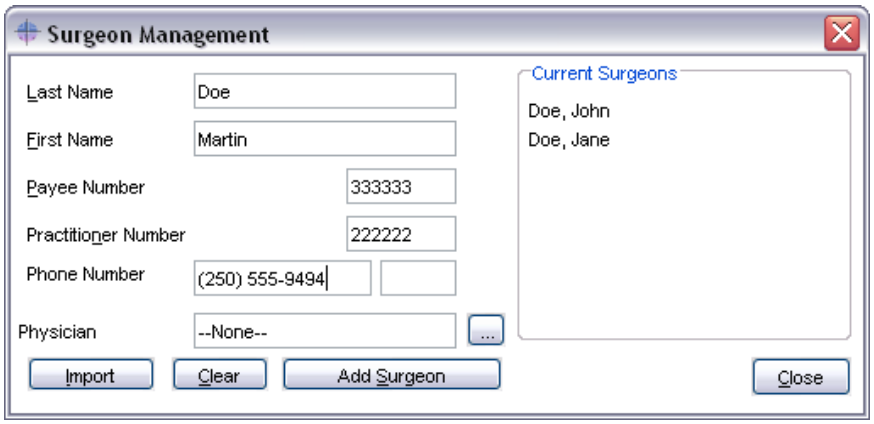
Before the waitlist will be fully functional, some configuration is required. Information about the surgeons is edited in the **Surgeon Management** section. Create a **Completion Information** screen to show your completed bookings.

Before you can create a booking, you must have a physician or surgeon.

Adding a Surgeon to the Waitlist

To add a surgeon to the waitlist

1. Under the **Tools** menu, select **Surgeon Management**. This will open the **Surgeon Management** dialog.



2. To add a surgeon that is already a provider in your clinic:
    1. Click the **Import** button.
    2. Click on a provider to select them.
    3. Click **Select**.
3. To add a new surgeon:
    1. Type the surgeon's **Last Name**, **First Name**, **Payee Number**, **Practitioner Number**, and **Phone Number** into the corresponding textboxes.

2. To associate the surgeon with an existing provider in the directory, click the button beside **Physician** ....

4. Click **Close**.

Adding a Completion Information template

The **Completion Information** tab in the **New Booking Request** section is customizable for each office.

To create a completion information template

1. Under the **Tools** menu, select **Completion Management**. This will open the **Completion Management** dialog.

2. Click the **Add** button. This will open the **New Completion Option** dialog.

3. Type a **Title** for your new option.

4. Select the **Type** of item for the option, for example check box, single line text box, or multi line text box.

5. Select or enter a **Default Value** depending on the type.

6. Click **Ok.**

7. Repeat for each option required.

FILE MENU

LABEL

Under Label, you can print, preview, and design custom labels.

PRINTING A LABEL

To print a label

1. Load a patient in Accuro.
2. Under the File menu, point to Label, and then select one of the labels.
3. You may need to choose a provider or an insurer depending on which label you select.
4. Click OK.

You can also print the Patient Demographics label by clicking on the status bar at the bottom of Accuro.

To preview a label

1. Load a patient in Accuro.
2. Under the File menu, point to Label, point to Preview, and choose one of the labels.

To design a custom label

1. Under the File menu, point to Label, and then select Label Wizard. This will open the Label Wizard dialog.
2. Type in a title for your label in the textbox beside Label.
3. For Line 1, create the label information you require.

    1. Type in text using your keyboard.
    2. Right-click, mouse to the data type you require, and select the data needed.
    3. For example, to display the patient name, you could type in “Patient Name:” and then right-click and select Patient -> Patient Last Name, type a comma, and then right-click and select Patient -> Patient First Name.
    4. Preview what the label will look like in the bottom right-hand corner.
    5. Repeat this for each line as your require.
    6. Choose if you wish to Share the label with other users.
    7. Under Preferences:
    8. Choose if you want to Prompt for the number of copies to print.
    9. Choose if you want to Center the label.
    10. Choose if it is an Appointment Label.
    11. Type in the Default Print Count for the label.

4. Click Add.
5. Your custom label can then be found beneath Label Wizard on the menu.

Print Form

Print VGH Booking Form

To print a VGH booking form

- Select Print VGH Booking Form from under the file menu.

Print SMH Booking Form

To print a SMH booking form

- Select Print SMH Booking Form from under the file menu.

Export

Import

Change Skin

Skin Preferences

To change the skin of Accuro

1. Select Change Skin from under the File menu.
2. Select a skin from the drop-down menu.
3. Click Apply.

Quit

Quitting the Program

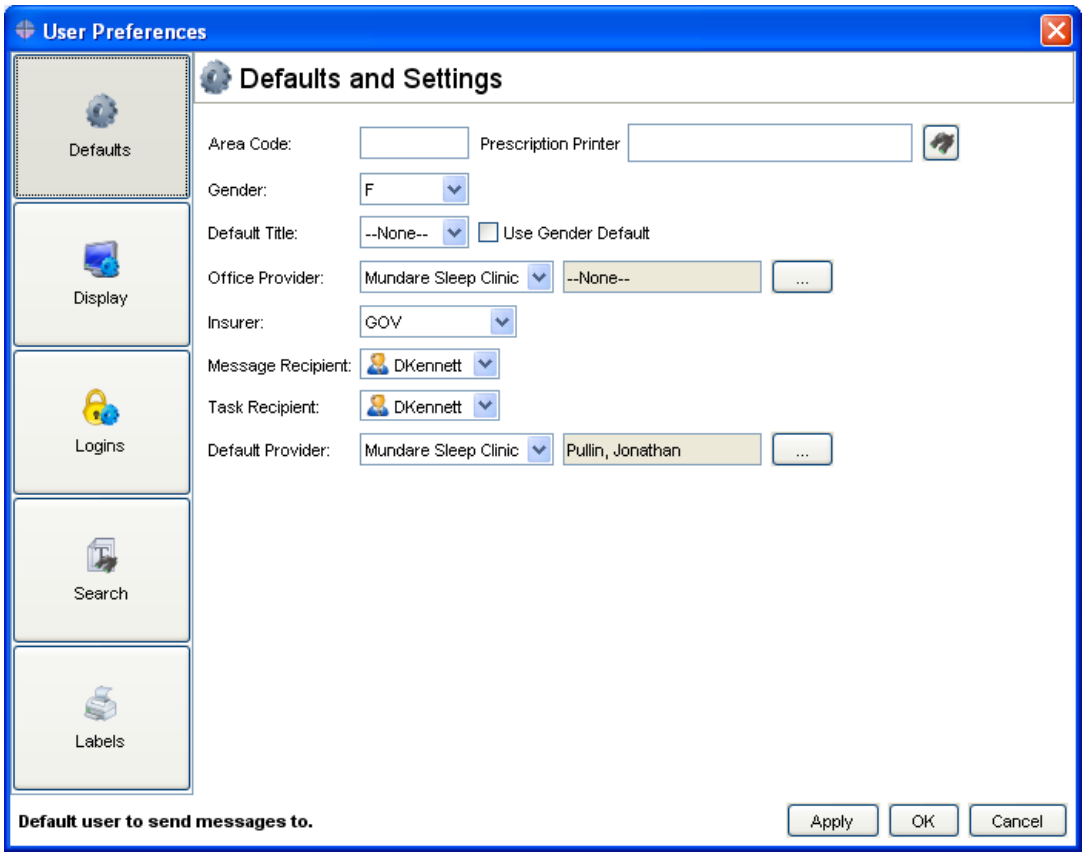
Select Quit under the File menu to close Accuro.

USER PREFERENCES

Defaults

Defaults and Settings

The defaults section allows you to set the default value for different sections of Accuro. If you mouse-over a setting, the meaning will be shown in the bottom-left hand corner of the dialog.



Area Code – The default area code for new patients under **Patient Demographics**

Prescription Printer – Select a printer used for prescriptions from the list of installed printers

Gender – The default gender for new patients under **Patient Demographics**

Default Title – The default title (ie – Mr, Mrs) for new patients under **Patient Demographics**

User Gender Default – Assign the **Default Title** and corresponding **Gender** (M or F) to new patients under **Patient Demographics**

Office Provider – The default clinic provider associated with new patients

Insurer – The default insurer for new patients under **Patient Demographics**

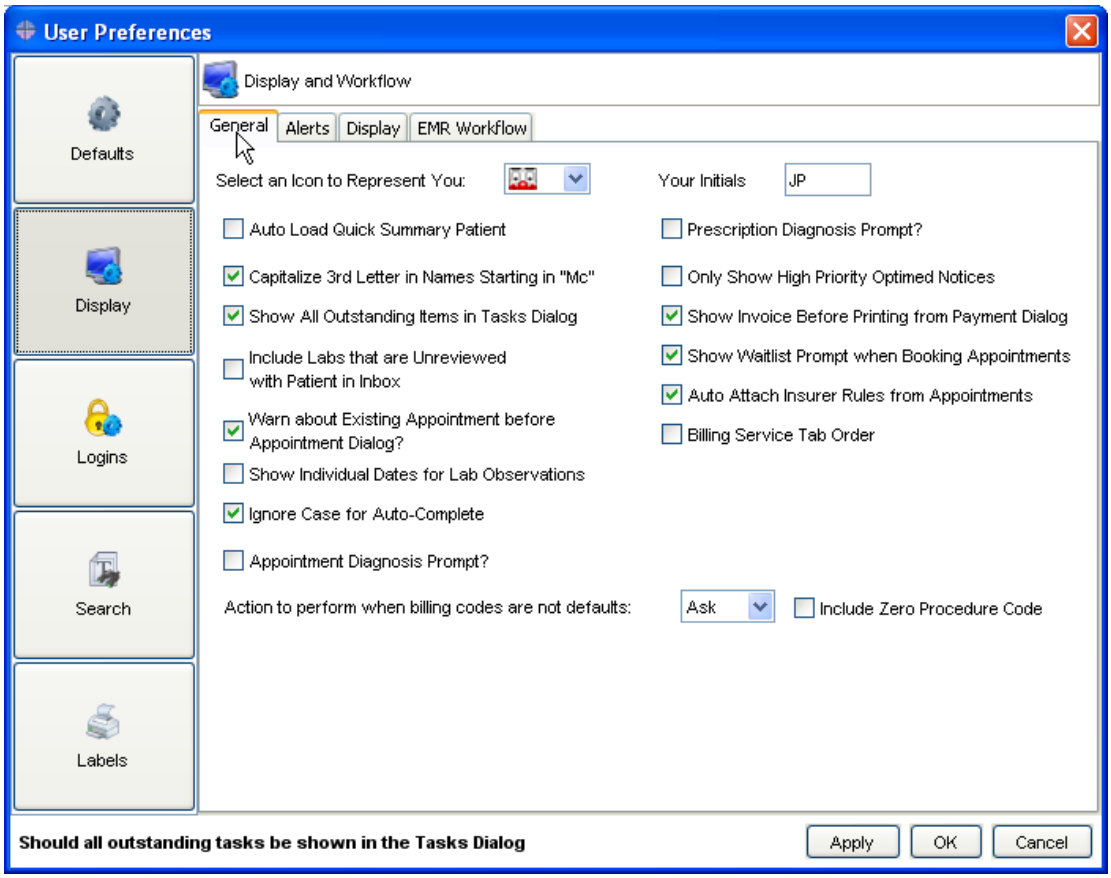
Message Recipient – The default recipient for new messages that are sent from the current user

Task Recipient – The default recipient for new tasks that are sent from the current user

Default Provider – The default provider to reset to when changing sections

Display

General Tab



Select an icon to represent you – This icon will represent you to other users, for example when sending a message

Auto Load Quick Summary Patient – Automatically load the selected patient into open Quick Summary

Capitalize 3rd Letter in Names Starting in "Mc" – Automatically capitalize letters following "Mc" in names (ie – McNeil)

Show All Outstanding Items in Tasks Dialog – All outstanding tasks will be shown in the Tasks dialog

Include Labs that are Unreviewed with Patient in Inbox –

Warn about Existing Appointment before Appointment Dialog – Warn the user about an existing appointment for the selected patient before creating a new appointment

Show Individual Dates for Lab Observations – Show individual observation dates at the end of the row when printing labs

Ignore Case for Auto-Complete – Ignore case for auto-complete fields

Appointment Diagnosis Prompt – Prompt for a diagnosis link after creating a new appointment

Prescription Diagnosis Prompt – Prompt for a diagnosis link when prescribing medications

Only Show High Priority Optimed Notices – Only receive high priority notices from Optimed Software Corp

Show Invoice Before Printing from Payment Dialog – Display the invoice before printing from the payment dialog

Show Waitlist Prompt when Booking Appointments –Notify if booking an appointment for a patient on the waitlist

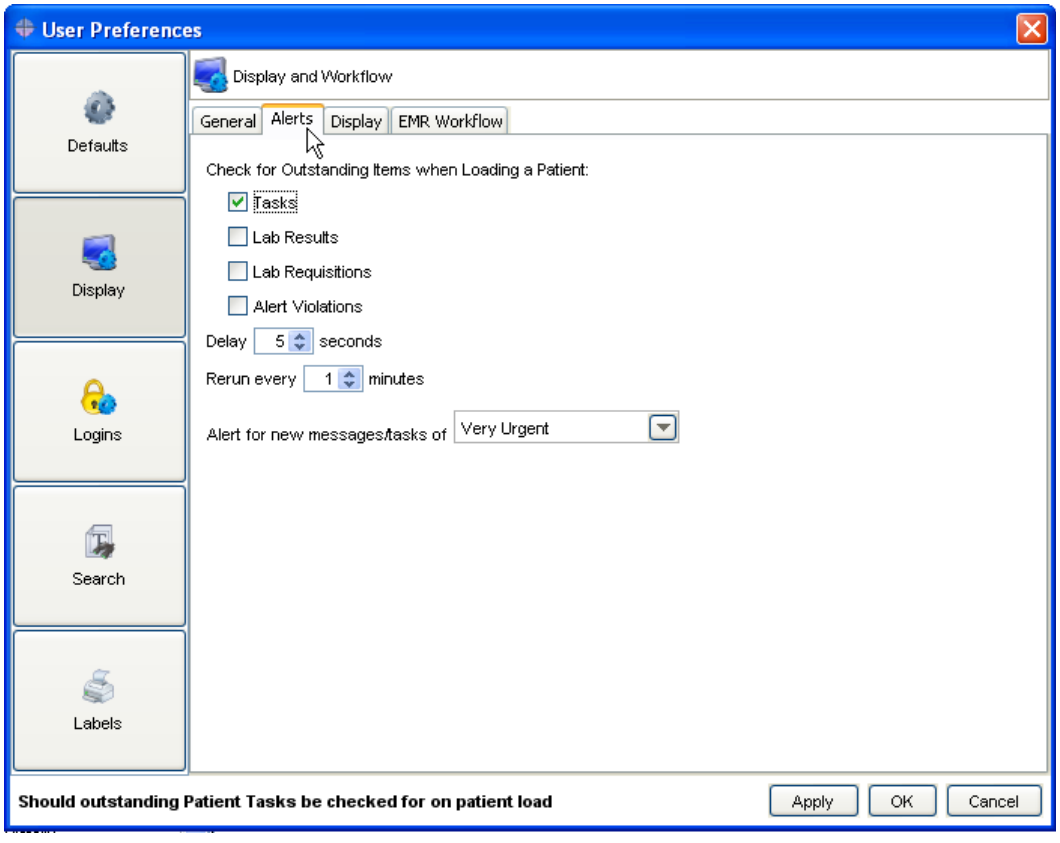
Auto Attach Insurer Rules from Appointments –

Billing Service Tab Order –

Action to Perform when Billing Codes are not Defaults –

Alerts

The Alerts tab allows you to customize which alert messages Accuro gives you.



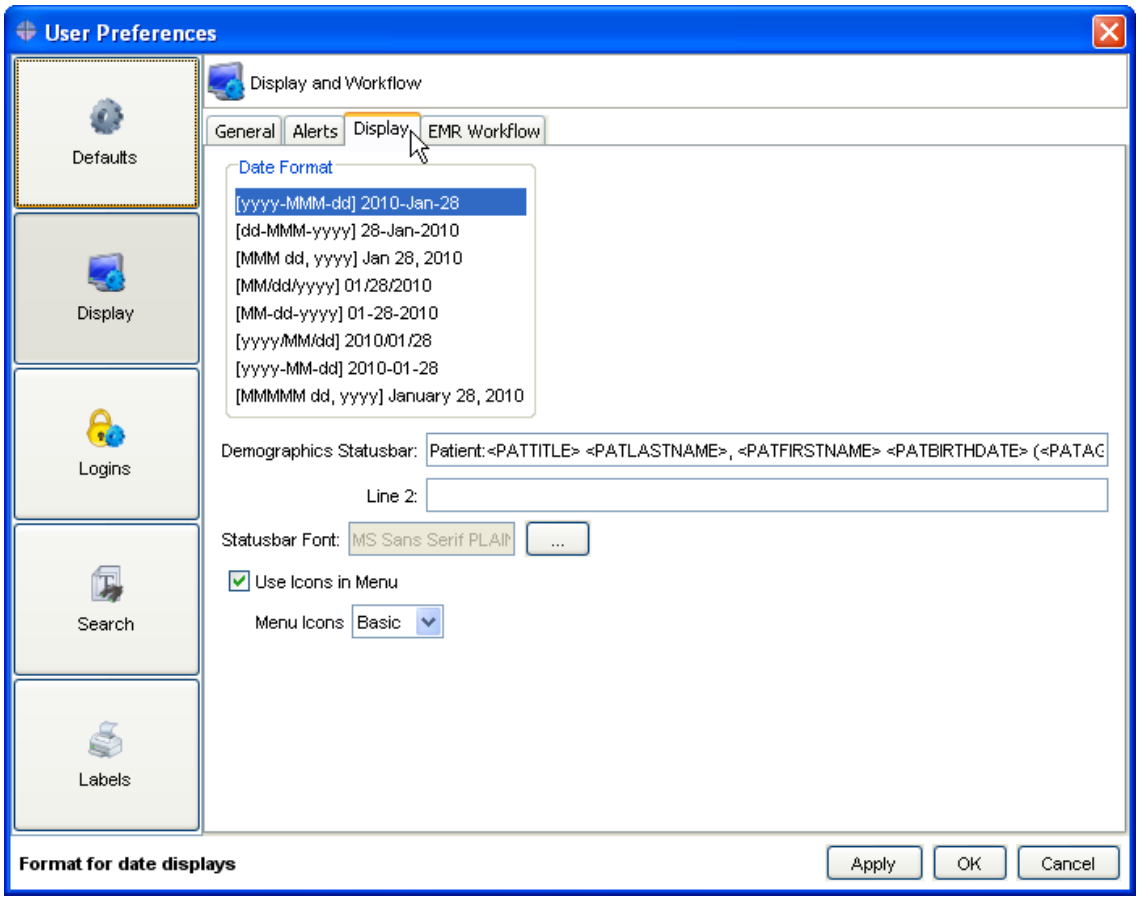
You can choose to be alerted for the following **Outstanding Items** when you load a patient: **Tasks**, **Lab Results**, **Lab Requisitions**, and **Alert Violations**. You can also choose how long to delay the alert and how often to run a reminder.

Click on the checkbox beside each **Outstanding Item** to be alerted for it.

You can choose the **Urgency** of new messages and tasks that you wish to be alerted for from the drop-down list.

Display

The Display tab is where you can select the **Date Format**, **Status Bar** settings, and **Icon** settings.



Date Format

You can change the **Date Format** by selecting a format from the selection box.

Demographics Status Bar

The **Demographics Status Bar** shows different information on the bottom status bar of Accuro. You can customize this as required.

To add a data item

1. Select the position on the **Statusbar** you wish to insert a new data item by clicking there. The cursor should then be in this position.

2. Right-click, and select a data item from one of the menus.

To remove a data item

1. Left-click and drag the mouse to highlight the item you want to remove.
2. Press the **Backspace** key on the keyboard.

Once you are done editing the **Status Bar**, click the **Apply** button.

Status Bar Font

You can change the **Status Bar Font** by clicking the button. This will open the **Select Font** dialog where you can change the font, font size, and styling such as bold and italics.

Side Menu Icons

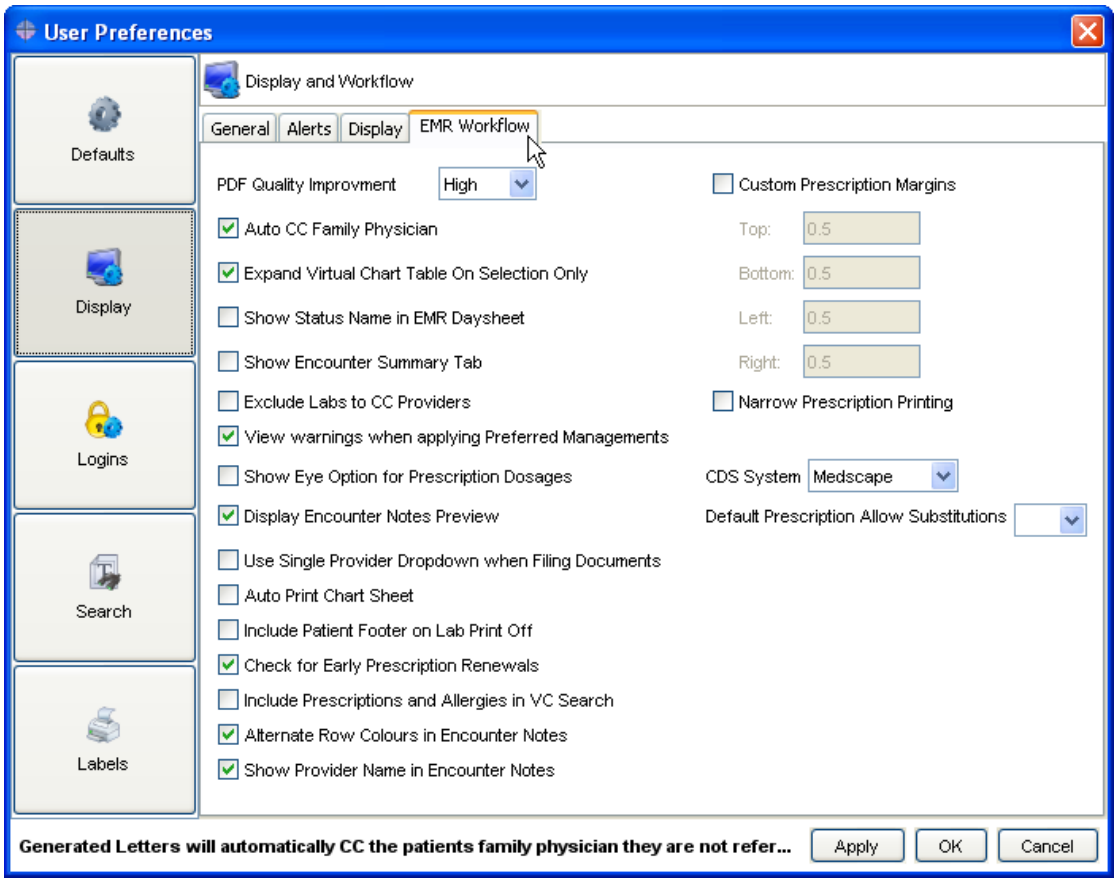
The final two options allow you to change the look of the side menu icons in Accuro.

You can choose whether or not to use icons in the menu. If this option is not selected, buttons instead of icons will be shown.

You can also choose two different styles of icons: **Basic** and **Simple**.

EMR Workflow

This tab allows you to select options related to working in the EMR section.



PDF Quality Improvement – Select the quality of PDFs that Accuro produces

Auto CC Family Physician – Generated letters will automatically CC the patient's family physician when they are not the referring physician

Show Status Name in EMR Daysheet – Show the name of the status rather than just the icon in the EMR Daysheet

Show Encounter Summary Tab – Show the Encounter Summary tab in the EMR section

Exclude Labs to CC Providers – Do not send labs to providers that are being CC'd

View Warnings when Applying Preferred Managements –

Show Eye Options for Prescription Doses – Show OD, OS, OU options when adding a dosage to prescriptions

Display Encounter Notes Preview – On mouseover, display a popup previewing the content of an Encounter Note

Use Single Provider Dropdown when Filing Documents – When checked, allows only one provider when filing a document

Auto Print Chart Sheet –

Include Patient Footer on Lab Print Off – Include footer containing patient's name when printing off a lab

Check for Early Prescription Renewals – Display a warning when attempting to renew a prescription too early

Include Prescriptions and Allergies in VC Search – Include prescriptions and allergies when searching in the Virtual Chart

Alternate Row Colors in Encounter Notes – Show Encounter Notes in alternating colors

Show Provider Name in Encounter Notes – Display the provider who created the Encounter Note

Custom Prescription Margins – If checked, use the four fields below to change the margins when printing a prescription

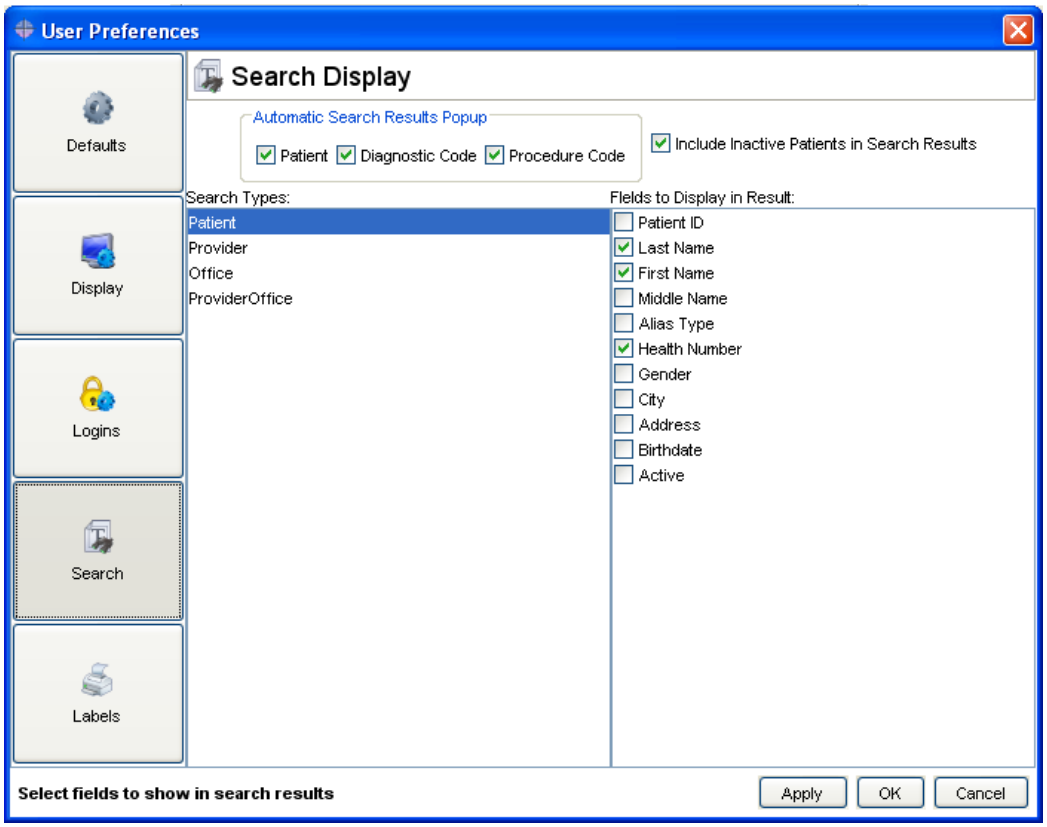
Narrow Prescription Printing –

CDS System –

Default Prescription Allow Substitutions – Choose whether prescriptions allow substitutions

Search

This section allows you to configure options for searching in Accuro.



Automatic Search Results Popup

When typing in a search string, Accuro can begin to search after the first few characters and show the results underneath in a drop-down box, narrowing the search with each new character added.

This feature is available when searching on **Patient Name**, **Diagnostic Code**, and **Procedure Code**.

To turn on automatic search results popup

1. Click the checkbox beside the desired search type (ensure it is checked)
2. Click **Apply**

Include Inactive Patients in Search Results – Include patients that have been marked as Inactive in your patient search

Choose Fields to Display in Result

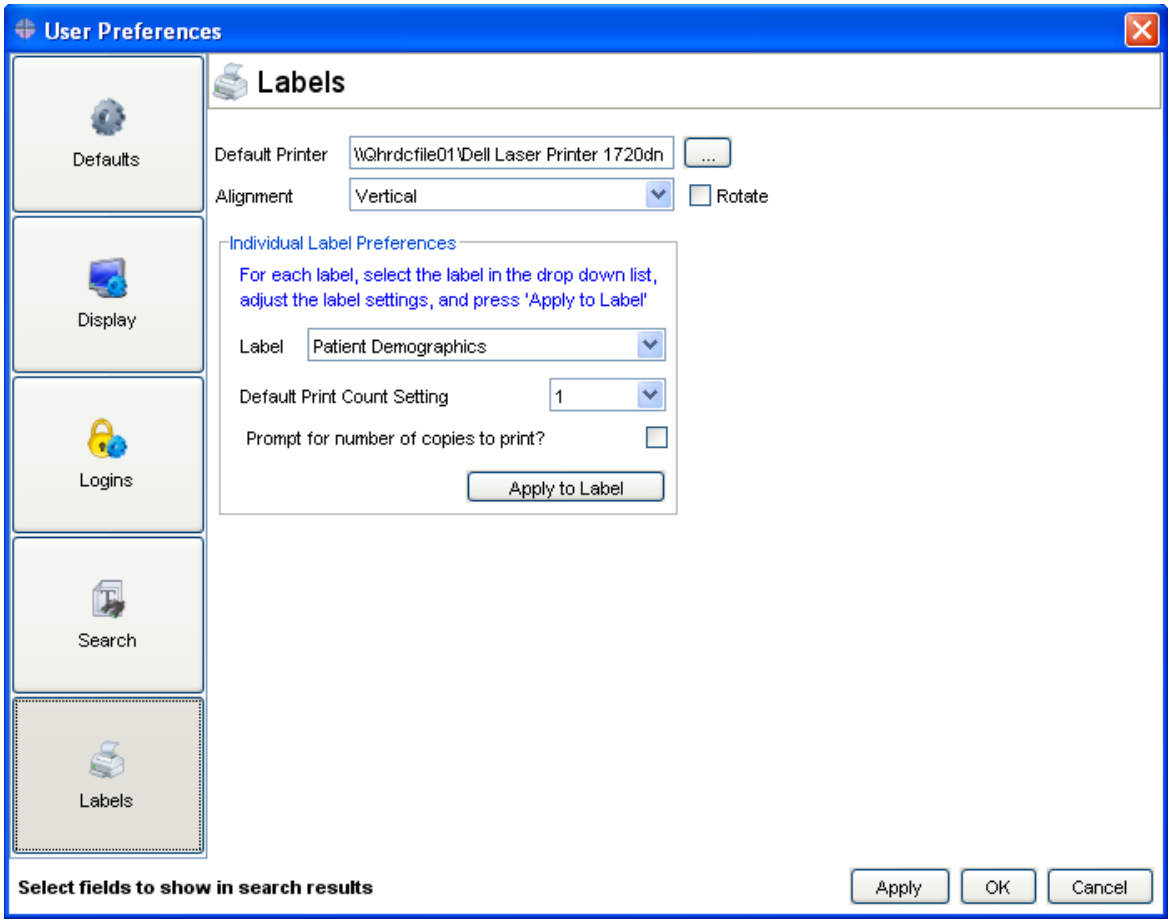
You can choose the fields to display in the result for searches on **Patient**, **Provider**, **Office**, **and ProviderOffice**.

To choose the fields to display for each type of search

1. Click on a **Search Type** to select it.
2. Click the checkbox beside each **Field** you wish to display in the search (ensure the boxes are checked).
3. Click **Apply**.

Labels

This section is used to set label printing options.



To set a printer as the default label printer, the printer must already be installed on the computer.

To select a default label printer

1. Click the button beside the **Default Printer** textbox .
2. Click **Yes** on the **Find Printers** prompt.
3. Click on a printer to select it.
4. Click **Select**.

To change the alignment of labels in the printer

1. Select an option from the **Alignment** drop-down list.
2. If you wish to rotate the label, click the checkbox beside **Rotate** to select it.
3. Click **Apply**.

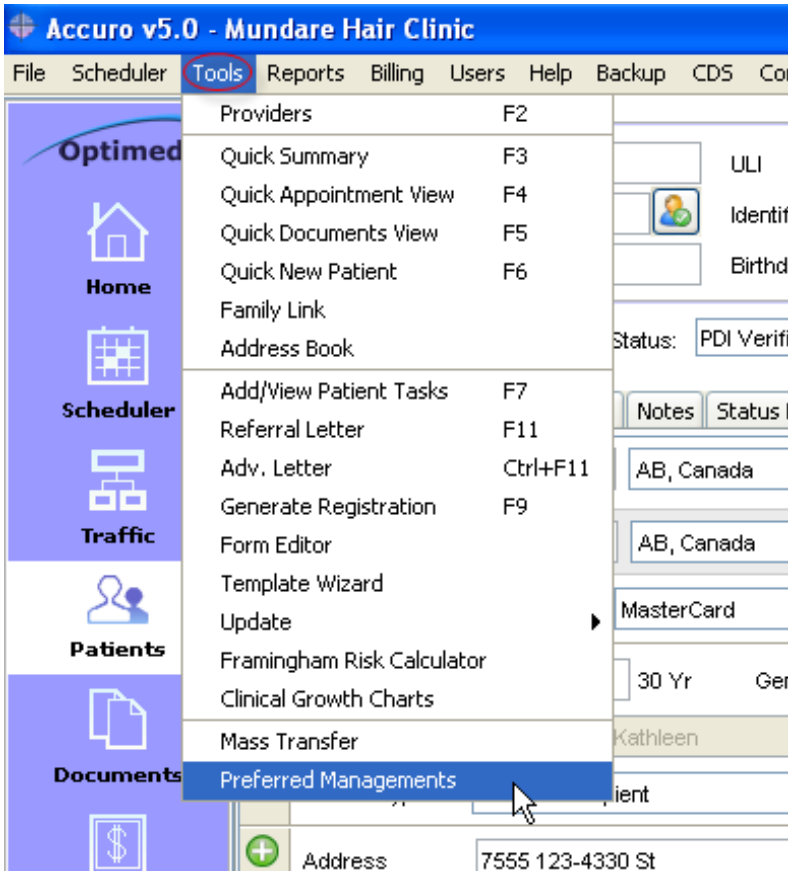
Individual Label Preferences

For each label, you can set the Default Print Count and choose whether to prompt the user of the number of copies to print.

To set print count settings for individual labels

1. Select a **Label** from the drop-down list.
2. Select a **Default Print Count Setting** from the drop-down list.
3. If you wish to **Prompt** the user for the number of copies to print, click the checkbox to select it.
4. Click **Apply to Label**.
5. Repeat for each label you wish to set preferences for.
6. Click **Apply** at the bottom of the dialog.

TOOLS MENU



Providers

This opens the **Provider Management**. See the **Provider Management** section.

Quick Summary

This opens the **Quick Patient Summary** dialog which shows the patient's **Virtual Chart**, **Patient Summary**, and **Encounter Summary**.

Quick Appointment View

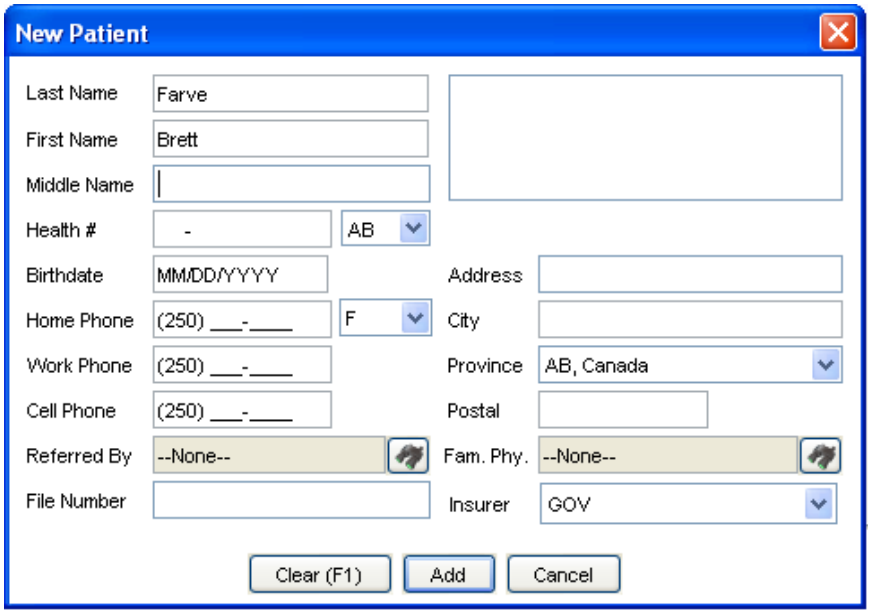
This opens the **Quick Patient Appointments View** dialog which shows the patient's **Appointment History**, **Waitlist History**, **Archived Appointment History**, and **Private Billing** tabs.

Quick Documents View

This opens the **Documents Previewer** dialog which shows all documents that have been filed to the patient's chart.

Quick New Patient

This opens the **New Patient** dialog.

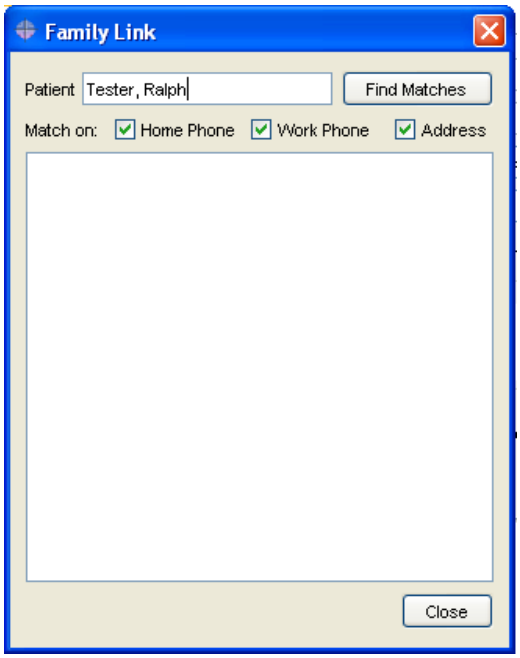


To add a new patient

1. Enter the **Last Name** and **First Name** into the respective text boxes. These are mandatory fields.
2. Enter as much demographic information about the patient as is known.
3. Click **Add**.

Family Link

This opens the **Family Link** dialog.



This can be used to find other patients with the same **Home Phone**, **Work Phone**, and **Address**.

Address Book

This opens the **Address Book** dialog. See the section on **Address Book**.

Add/View Patient Tasks

This opens the **Patient Tasks** dialog. See the section on **Tasks**.

Referral Letter

Adv. Letter

This will open a new letter from a note. See the section on **Encounter Notes** – **Letter Creation**.

Generate Registration

Form Editor

See the section on the **Form Editor**.

Template Wizard

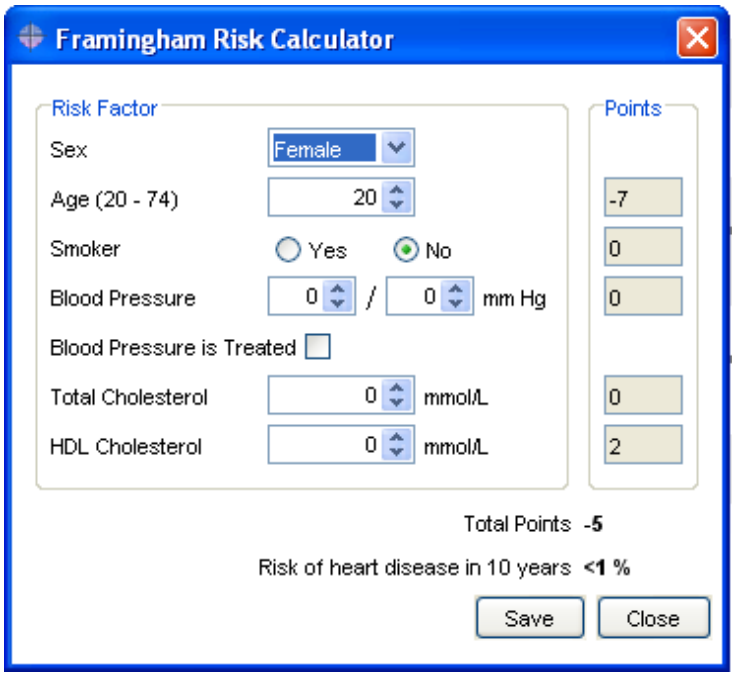
See the section on the **Template Wizard** under **EMR**.

Update

Depending on your province, there will be different update types available under **Update**. You will be able to automatically update your fee codes, medications, and other lists.

Framingham Risk Calculator

This will open the **Framingham Risk Calculator** dialog.

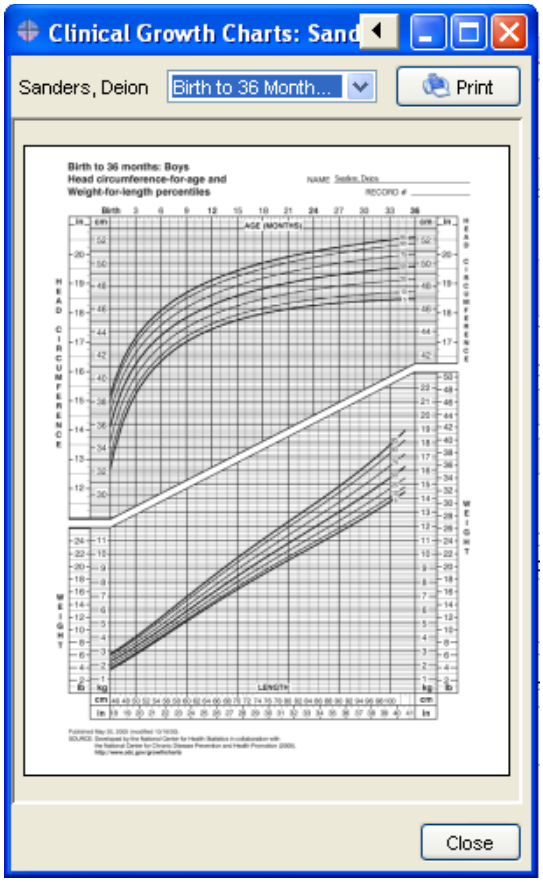


To calculate the Framingham Risk for a patient

1. Open the **Framingham Risk Calculator** after loading a patient.
2. Select whether the patient is a **Smoker**.
3. Enter the patient's **Blood Pressure**.
4. If the blood pressure has been treated, click on the checkbox.
5. Select a **Total Cholesterol** from the dropdown list.
6. Select an **HDL Cholesterol** level from the dropdown list.
7. Click **Save**.
8. The results will be saved to the patient's **Encounter Notes** section.

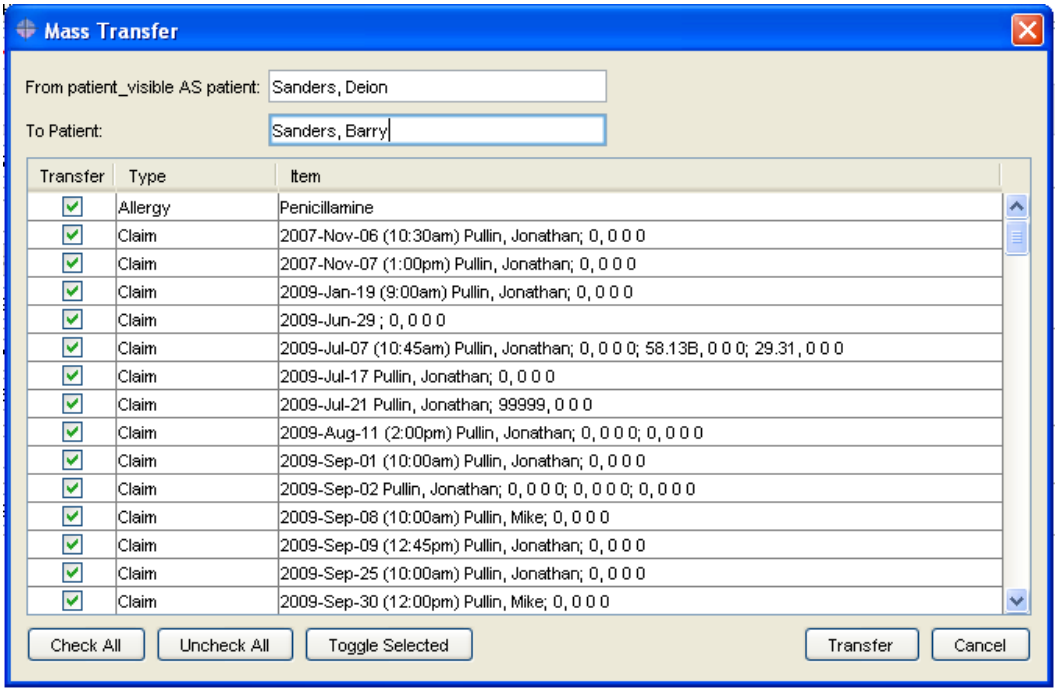
Clinical Growth Charts

This will open the **Clinical Growth Charts** dialog for the loaded patient.



Mass Transfer

The **Mass Transfer** dialog is used to transfer more than one item between patients' charts.


Mass Transfer
From patient_visible AS patient: Sanders, Deion
To Patient: Sanders, Barry
Transfer
Type
Item
Allergy
Penicillamine
Claim
2007-Nov-06 (10:30am) Pullin, Jonathan; 0, 0 0 0
Claim
2007-Nov-07 (1:00pm) Pullin, Jonathan; 0, 0 0 0
Claim
2009-Jan-19 (9:00am) Pullin, Jonathan; 0, 0 0 0
Claim
2009-Jun-29 ; 0, 0 0 0
Claim
2009-Jul-07 (10:45am) Pullin, Jonathan; 0, 0 0 0; 58.13B, 0 0 0; 29.31, 0 0 0
Claim
2009-Jul-17 Pullin, Jonathan; 0, 0 0 0
Claim
2009-Jul-21 Pullin, Jonathan; 99999, 0 0 0
Claim
2009-Aug-11 (2:00pm) Pullin, Jonathan; 0, 0 0 0; 0, 0 0 0
Claim
2009-Sep-01 (10:00am) Pullin, Jonathan; 0, 0 0 0
Claim
2009-Sep-02 Pullin, Jonathan; 0, 0 0 0; 0, 0 0 0; 0, 0 0 0
Claim
2009-Sep-08 (10:00am) Pullin, Mike; 0, 0 0 0
Claim
2009-Sep-09 (12:45pm) Pullin, Jonathan; 0, 0 0 0
Claim
2009-Sep-25 (10:00am) Pullin, Jonathan; 0, 0 0 0
Claim
2009-Sep-30 (12:00pm) Pullin, Mike; 0, 0 0 0
Check All
Uncheck All
Toggle Selected
Transfer
Cancel

To transfer items from one patient to another

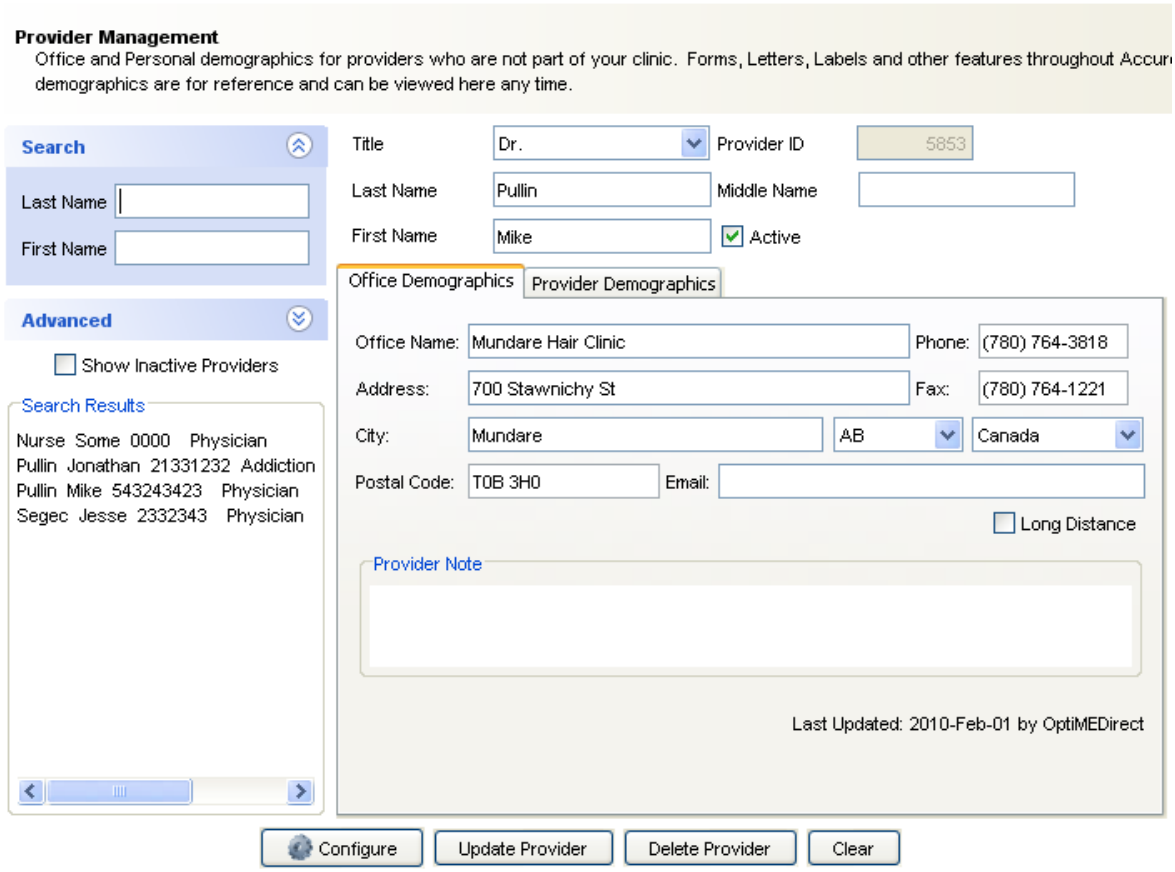
1. Open the **Mass Transfer** dialog.
2. Select a **From** patient using the **Search Tool** if different than the patient loaded.
3. Select a **To** patient using the **Search Tool**.
4. Check the items you wish to transfer.
    - Use the **Check All**, **Uncheck All**, and **Toggle Selected** buttons to mass select or unselect items.
5. Click the **Transfer** button.

Preferred Managements

Provider Management

The **Provider Management** area is where providers in your clinic can be configured. Press **F2** on your keyboard or go under the **Tools** menu to **Providers**.

You can also set and view office and personal demographics for providers who are not part of your office.



Searching for Providers

Use the **Search Tool** to look up providers and change both Office and Provider Demographics.

To search for a provider

1. Click the **Clear** button.
2. Type a provider last name in the **Last Name** field.
3. Click on a provider in the **Search Results** box to select them.

Adding a Provider

If the provider you are searching for does not appear, you can add them.

To add a provider

1. Click the **Clear** button.

2. Type in a **Last Name** and a **First Name**.

3. Click **Add Provider**.

Updating a Provider

To update a provider

1. Search for the provider and select them.

2. Use the **Office Demographics** and **Provider Demographics** tabs to enter in any known demographic information.

3. Click the **Update** button.

Deleting a Provider

To delete a provider

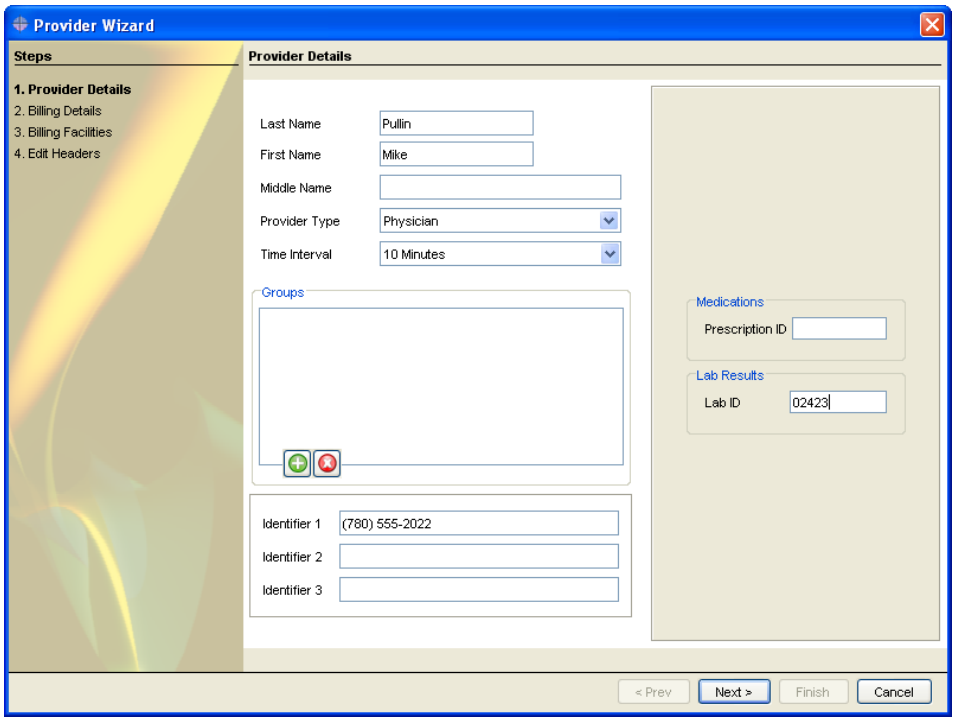
1. Search for the provider and select them.

2. Click the **Delete Provider** button.

Provider Wizard

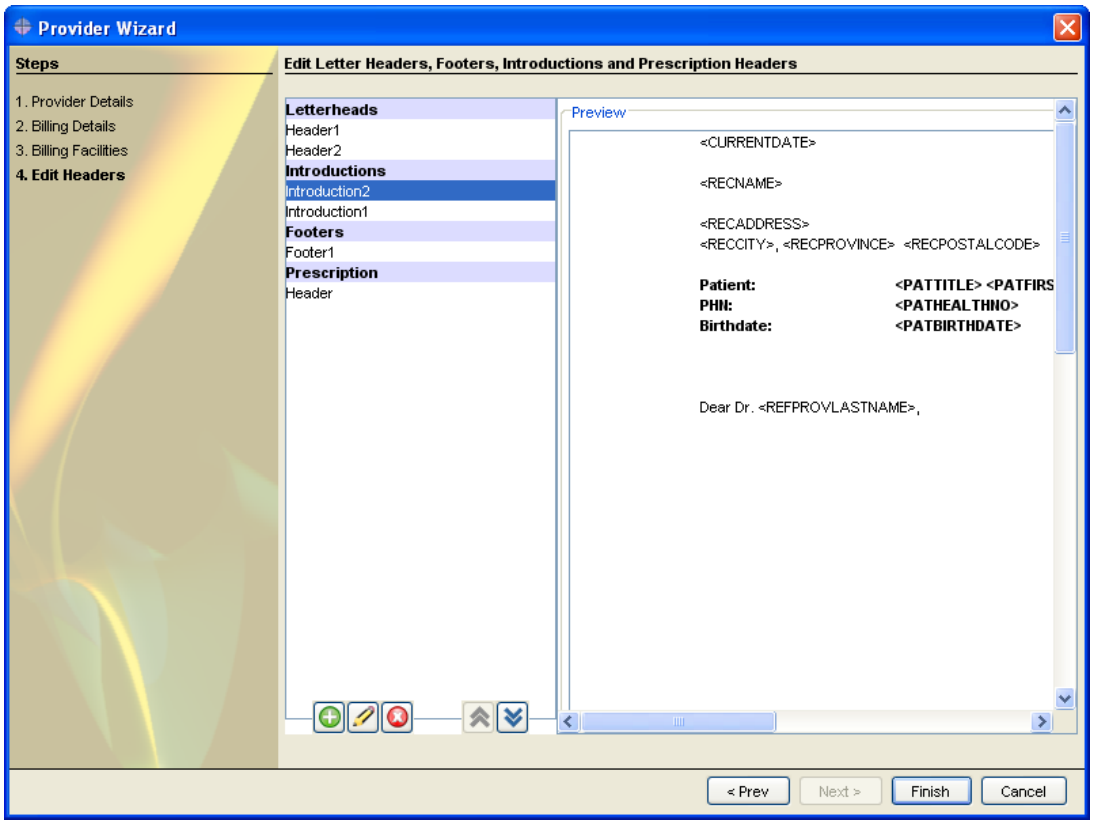
If the provider you search for and select is a part of your office, the **Configure** button will be enabled. Click this button to access the **Provider Wizard**.

The Provider Wizard consists of four sections or five sections depending on your province. The first several sections are used by Optimed Client Services to setup demographic and billing information for the providers in your office. Please speak to Accuro support (1-866-729-8889) before making any changes.



Edit Headers

In the Edit Headers section, you can create and manage **Letterheads**, **Introductions**, **Footers**, and **Prescriptions**.



Adding a New Letterhead

To add a new letterhead

1. Click the **Add** button .
2. Select **Letterhead**, and click **Next**.
3. Choose one of **Create New**, **Copy Existing**, or **Create from Template**.
   - ***To create a new letterhead from scratch:***
     1. Select **Create New**, and click **Next**.
     2. Click **Finish**.
   - ***To copy an existing letterhead:***
     1. Select **Copy Existing**, and click **Next**.
     2. Select an existing header.
     3. Click **Finish**.

- ***To create from template:***

    1. Select **Create from Template**, and click **Next**.
    2. Click on a template to select it, and click **Finish**.

4. Enter in a **Title**.
5. Click **Switch to HTML**.
6. Type in or edit the HTML code for the header.
7. Click **Switch to Preview** to view how your code will look.
8. When satisfied, click **OK**.

Editing a Letterhead

1. Click on a letterhead to select it.
2. Click the **Edit** button .
3. Click **Switch to HTML**.
4. Type in or edit the HTML code for the header.
5. Click **Switch to Preview** to view how your code will look.
6. When satisfied, click **OK**.

Deleting a Letterhead

1. Click on a letterhead to select it.
2. Click the **Remove** button .

Adding an Introduction

To add a new introduction

1. Click the **Add** button .
2. Select **Introduction**, and click **Next**.
3. Choose one of **Create New**, **Copy Existing**, or **Create from Template**.

    - ***To create a new introduction from scratch:***

        1. Select **Create New**, and click **Next**.
        2. Click **Finish**.

- ***To copy an existing introduction:***

    1. Select **Copy Existing**, and click **Next**.
    2. Select an existing header.
    3. Click **Finish**.

- ***To create from introduction:***

    1. Select **Create from Template**, and click **Next**.
    2. Click on a template to select it, and click **Finish**.

4. Enter in a **Title**.
5. Enter text and tags for the letter introduction.
    - To insert a tag, first set the cursor position with the left mouse button, and then right-click for a list of tags.
    - Use the buttons along the bottom to italicize, bold, or underline selected text.
6. When satisfied, click **OK**.

Editing an Existing Introduction

1. Click on an introduction to select it.
2. Click the **Edit** button .
3. Enter or remove text and tags for the letter introduction.
    - To insert a tag, first set the cursor position with the left mouse button, and then right-click for a list of tags.
    - Use the buttons along the bottom to italicize, bold, or underline selected text.
4. When satisfied, click **OK**.

Deleting an Introduction

1. Click on an introduction to select it.
2. Click the **Remove** button .

Adding a Footer

To add a new footer

1. Click the **Add** button .

2. Select **Footer**, and click **Next**.
3. Choose one of **Create New**, **Copy Existing**, or **Create from Template**.
   - ***To create a new footer from scratch:***
     1. Select **Create New**, and click **Next**.
     2. Click **Finish**.
   - ***To copy an existing footer:***
     1. Select **Copy Existing**, and click **Next**.
     2. Select an existing header.
     3. Click **Finish**.
   - ***To create from footer:***
     1. Select **Create from Template**, and click **Next**.
     2. Click on a template to select it, and click **Finish**.
4. Enter in a **Title**.
5. Click **Switch to HTML**.
6. Type in or edit the HTML code for the header.
7. Click **Switch to Preview** to view how your code will look.
8. When satisfied, click **OK**.

Editing an Existing Footer

1. Click on a footer to select it.
2. Click the **Edit** button .
3. Click **Switch to HTML**.
4. Type in or edit the HTML code for the footer.
5. Click **Switch to Preview** to view how your code will look.
6. When satisfied, click **OK**.

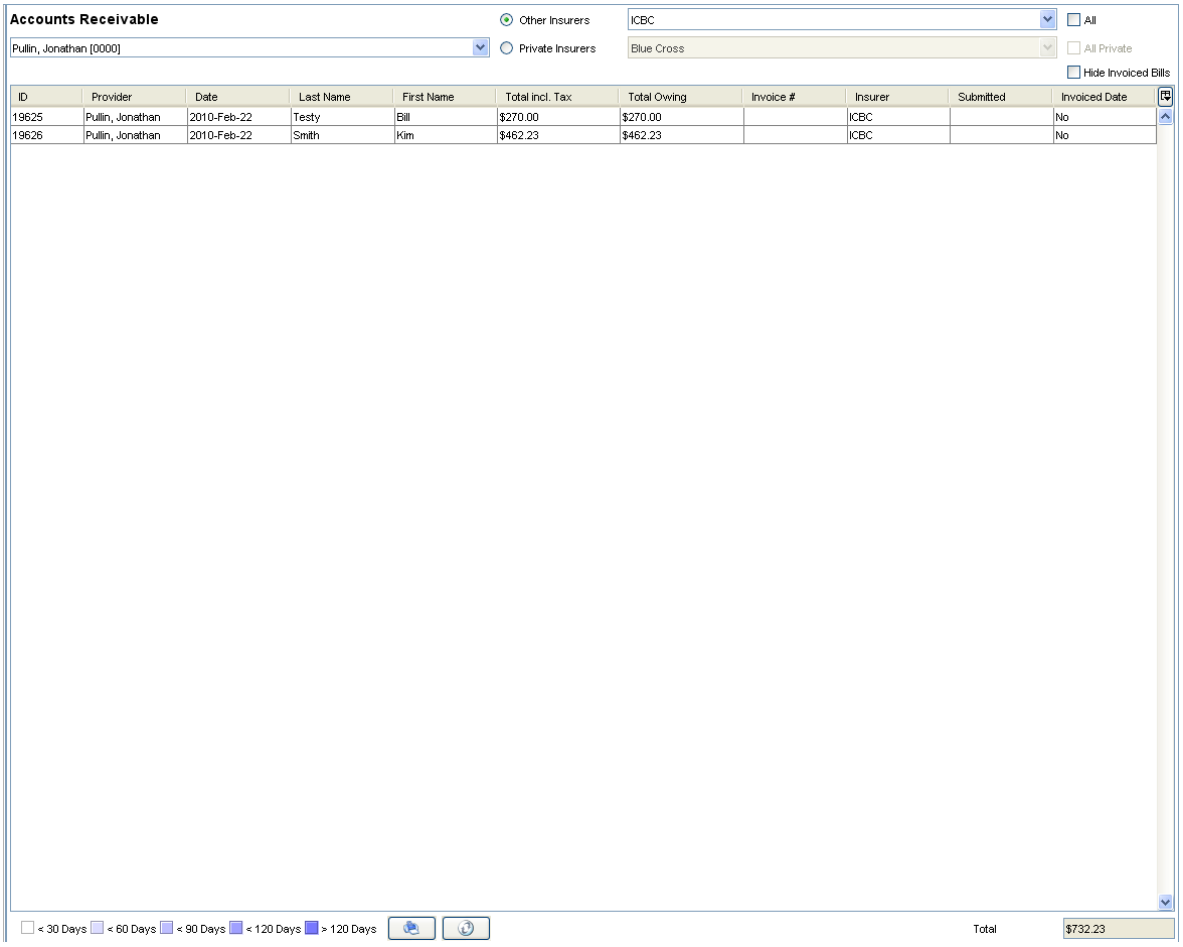
Deleting a Footer

1. Click on a footer to select it.
2. Click the **Remove** button .

REPORTS

Accounts Receivable by Insurer

Selecting A/R by Insurer will display an Accounts Receivable report that can be sorted by provider and insurer.



Sorting the A/R Report

The report is a combination of provider and insurer.

To view accounts receivable for a provider

- Select the provider from the drop-down list located at the top-left of the screen.

To select an insurer

1. If the insurer you wish to select is a private insurer, click on the radio button beside **Private Insurers**. Otherwise leave the **Other Insurers** radio button selected.

2. Select the desired insurer from the drop-down menu.

Opening a Claim History

To open a claim history for a claim

1. Point to a claim and right-click.
2. Select **Claim History** from the pop-up menu.

Opening Claim Details

To open claim details

1. Point to a claim and right-click.
2. Select **Claim Details** from the pop-up menu.

Setting a Claim to Write-Off or Adjust-to-Paid

To set a claim to write-off or adjust-to-paid

1. Point to a claim and right-click.
2. Select **Write-Off** or **Adjust-to-Paid**.

Viewing a Bill's Log History

To view a bill's log history

1. Point to a claim and right-click.
2. Select **Bill Log History**.

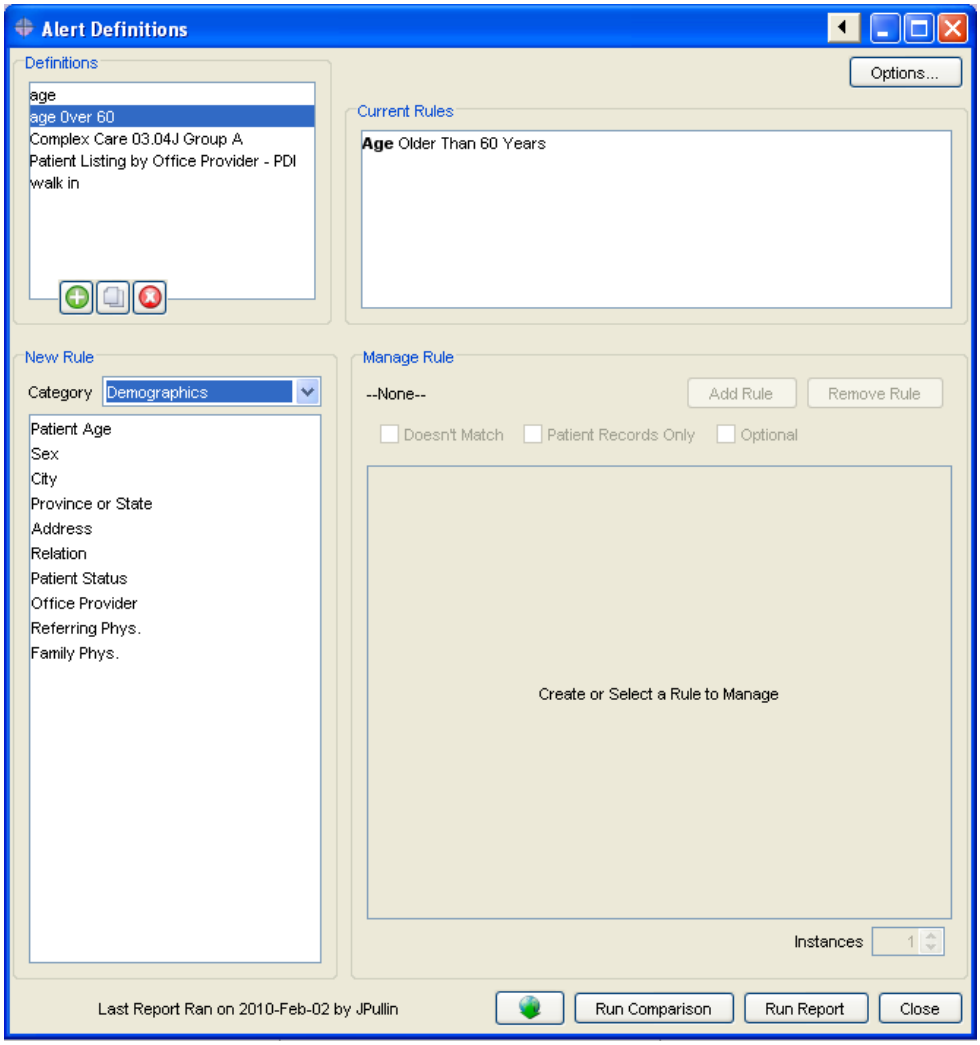
Insurer Payments

Reporting

Requisition Forms

ALERTS (QUERY BUILDER)

The **Query Builder** is used to run **Queries** on the database to extract a subset of patients. Queries are based on a set of rules. The resulting subset of patients can be printed off as a report, or have actions taken such as creating a task or alert for them.



Alert Definitions

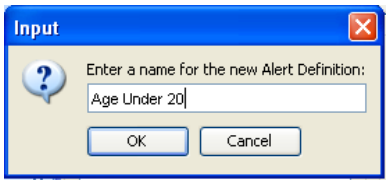
First, a definition is created. Rules are then added to the definition. When a report is run on a definition, all rules in the definition are run concurrently, which creates a subset of patients.

Creating a Definition

To create a definition

1. Click the **Add** button in the top-left corner under **Definitions**.

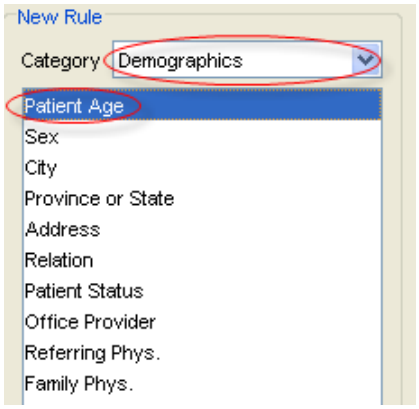
2. Enter a name for the definition.



3. Click **OK**.

To add rules to a definition

1. Select a **Category** from the drop-down list under **New Rule**.
2. Choose a **Data Record** to constrain your rule on from the list below **Category**.



3. Create a **Rule**.

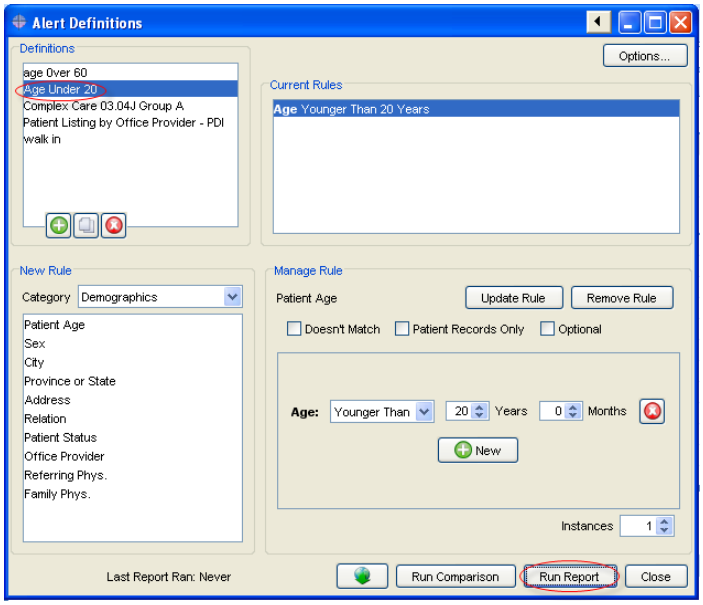
- If the rule currently says "**Not Constrained**", click **New** to add a constraint. Otherwise, clicking **New** will add a second constraint.
- If the rule currently says "**Not Constrained**" and you click **Add Rule**, the rule will be added as "**Data Record Exists**".
- You can select **Doesn't Match**, **Patient Records Only**, or **Optional** for the rule.

4. Click **Add Rule** to add the rule to the **Current Rules** for the definition.

5. Repeat as necessary until you have the required constraints for your **Query Definition.**

Running a Report

To run a report on a definition

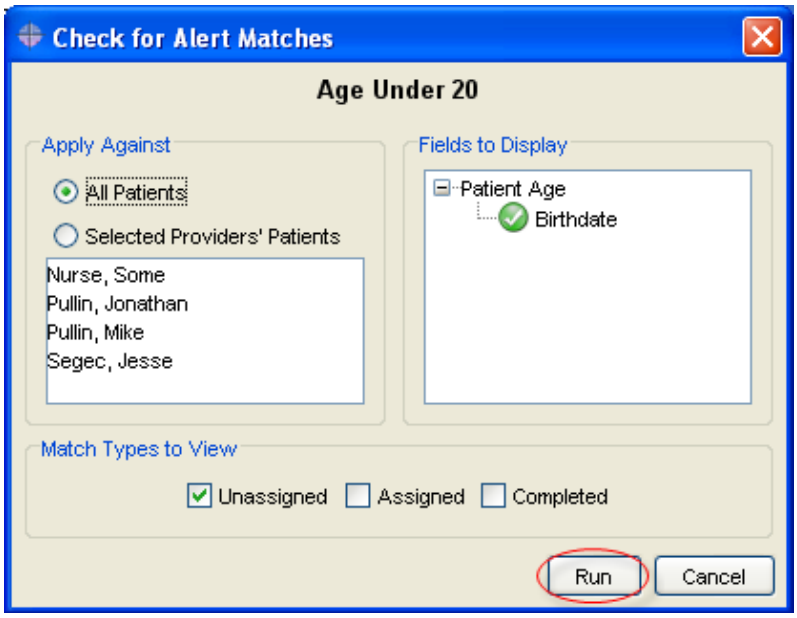


1. Click on a **Definition** to select it.

2. Click **Run Report**. This will open the **Check for Alert Matches** dialog.

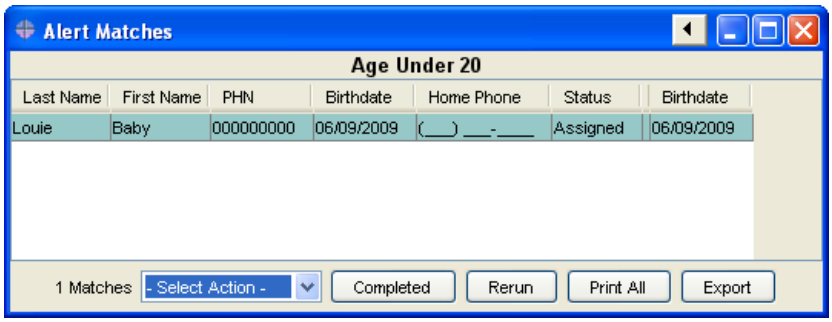
3. Select the **Provider(s)** whose patients you wish to include in the report, or select **All Patients**.

4. Choose whether or not you wish to include patients with an alert status of **Unassigned**, **Assigned**, and/or **Completed**.



5. Click **Run**. This will open the **Alert Matches** dialog with the results of your report.

6. Once the report has been run, you have several options with the results.



- You can select an action from the drop-down that will be applied to each patient on the list. Actions include **Create Task**, **Apply Vaccine**, **Create Notes**, **Create Bill**, and **Assign Patient Flag**.
- You can set the **Status** for the task to **Completed**.
- You can **Rerun** the report.
- You can **Print** or **Export** the list.

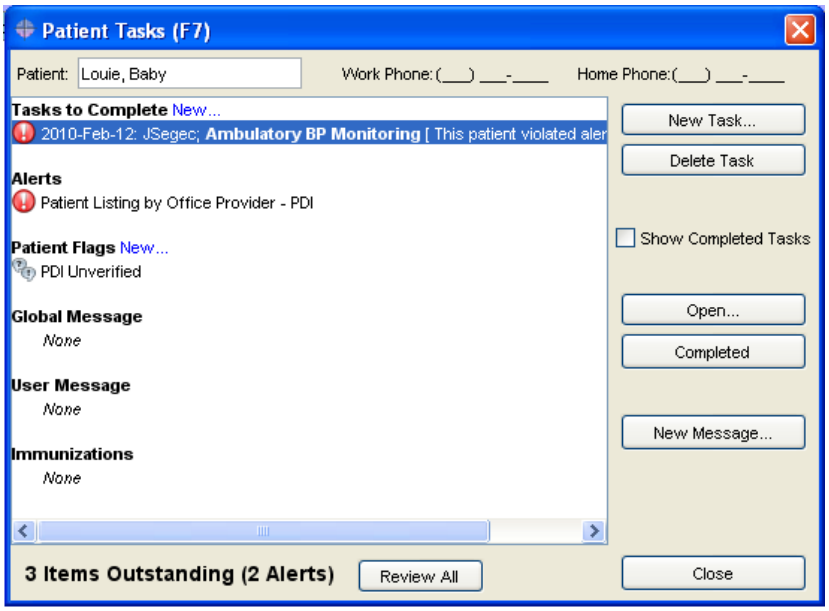
Alerts and Tasks

If a patient has had an alert or task added to their file, a red exclamation icon will appear next to the patient's name when they are loaded in Accuro.

If a patient has had a patient flag added, an icon resembling two speech balloons will appear.

Completing and Removing Tasks and Flags

Once you come across a patient with an alert or flag, you can double-click on the alert or flag icon to open the **Patient Tasks** dialog.



To complete a task or alert

1. Click on the task or alert.
2. Click the **Completed** button.

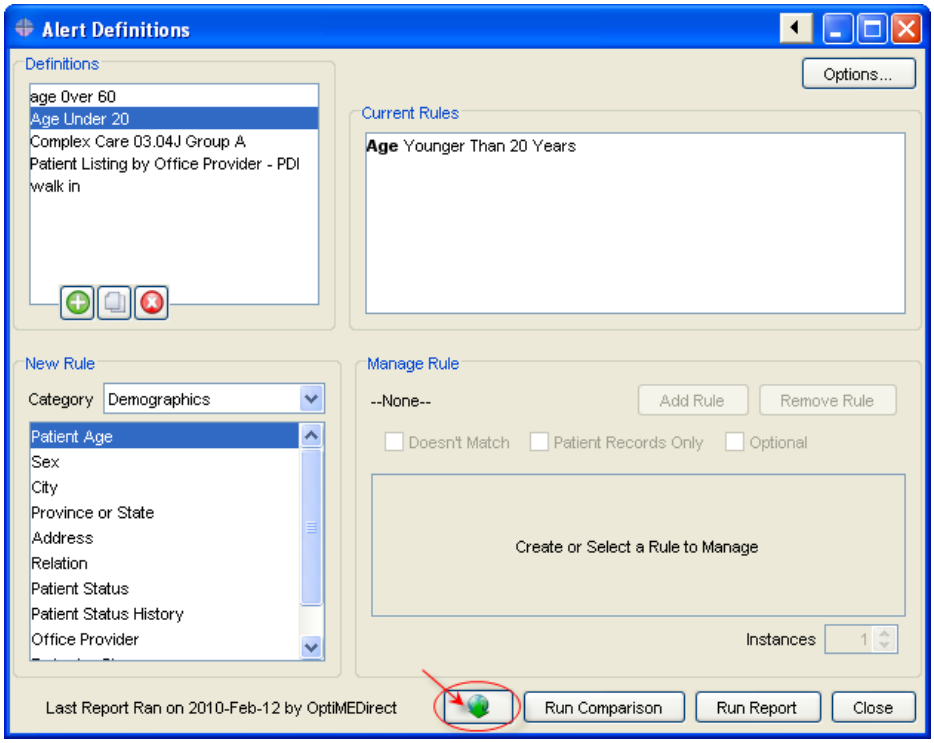
To remove a patient flag

1. Click on the flag.
2. Click the **Remove** button.

Alert Publisher

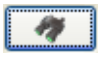
Accuro has access to an online datebase of alerts which can be downloaded and used.

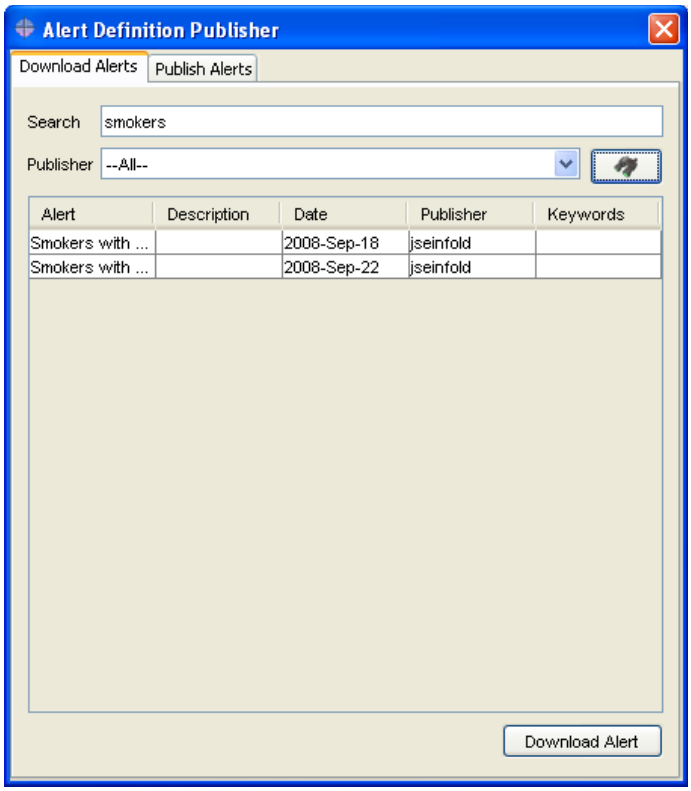
To open the **Alert Publisher**, click the green **Publisher** icon at the bottom of the **Alert Definitions** dialog.



Downloading an Alert

To download an alert

1. Click on the **Download Alerts** tab.
2. Type a keyword into the **Search** textbox.
3. Select a **Publisher** if you know the username of the publisher.
4. Click the **Search** button  .
5. Click on the alert to select it.
6. Click **Download Alert**.


Alert Definition Publisher
Download Alerts
Publish Alerts
Search
smokers
Publisher
--All--
Alert
Description
Date
Publisher
Keywords
Smokers with ...
2008-Sep-18
jseinfold
Smokers with ...
2008-Sep-22
jseinfold
Download Alert

ADDRESS BOOK

The Address Book is used to store and retrieve contact information for Pharmacies, Providers, Insurers, and General Contacts.

Searching for a Contact

To search for a contact

1. Type in a contact name using the Search Tool format (Lastname, Firstname).
2. Click the Search button.

Adding a Contact

If the contact cannot be found, you will have to add them into the appropriate category.

To Add a Contact

1. Click on the Contact tab.
3. Type in a Name.
4. Add as much demographic information as possible (Phone, Fax, Address, etc).
5. Click Update.

To Add a Pharmacy

1. Click on the Pharmacy tab.
2. Type in a Name.
3. Add as much demographic information as possible (Phone, Fax, Address, etc).
4. Click Update.

To Add a Provider

1. Click on the Provider tab.
2. Click the Manage Provider button.
3. Enter in a Last Name, First Name, and Practitioner Number.
5. Enter is as much additional demographic information as possible.
6. Click Add.

To Add an Insurer

1. Click on the Insurer tab.
2. Click the Manage Insurers button.
3. Click the Add button .
4. Enter an Insurer Name.
5. Enter as much demographic information as possible.
7. Click Add.

THE HELP MENU

Help

Selecting **Help** will open the **Accuro User Manual**.

About Accuro

Selecting **About Accuro** will open the **About Accuro** dialog. This dialog consists of four tabs: **Information**, **Details**, **Settings**, and **License**.

The **Information** tab contains a description of the Accuro software.

The **Details** tab shows specifications such as **Build Date**, **Version**, and **Last Updated**.

The **Settings** tab is used to set the amount of RAM that Accuro has access to on the computer it is installed on.

The **License** tab displays the current license **Name** and **Expiry** date.

Send Feedback

Accuro Feedback is used to send a message to our Client Services staff. This can be used instead of calling our support line and an Incident Report, or Case, is automatically created in our tracking system. Once Client Services receives your feedback, someone will call you to help you with your problem.

Send User Feedback to Optimed

To send a feedback

1. Select **Send Feedback** from under the **Help** menu. This will open the **Accuro Feedback** dialog.
2. Type your **Email Address** in the space provided.
3. Type in a **Subject** for your message.
4. Type a message in the text area below the subject.
5. If it is a new feedback, click on **New Feedback**. If it is a subject you have already sent a message about, select **Previously Submitted**.

6. Click **Send**.

Print Manual

To print the entire user manual, select **Print Manual** from the **Help** menu.

Submit Log

To submit a log to **Accuro Client Services**, select **Submit Log** from the **Help** menu, and then click **Yes** to confirm.

Release Notes

To view the latest **Release Notes** (changes to Accuro), select **Release Notes** from the **Help** menu.

Remote Assistance

To start a remote login session with an **Accuro Client Services** staff member, select **Remote Assistance**.

New User Form

If a new user needs to be added to your Accuro, a **New User Form** will need to be filled out, signed, and faxed to Optimed by the Clinic Manager at your office.

New Provider Form

Similarly if a new provider needs to be added to your Accuro, a **New Provider Form** will need to be filled out, signed, and faxed to Optimed by the Clinic Manager at your office.

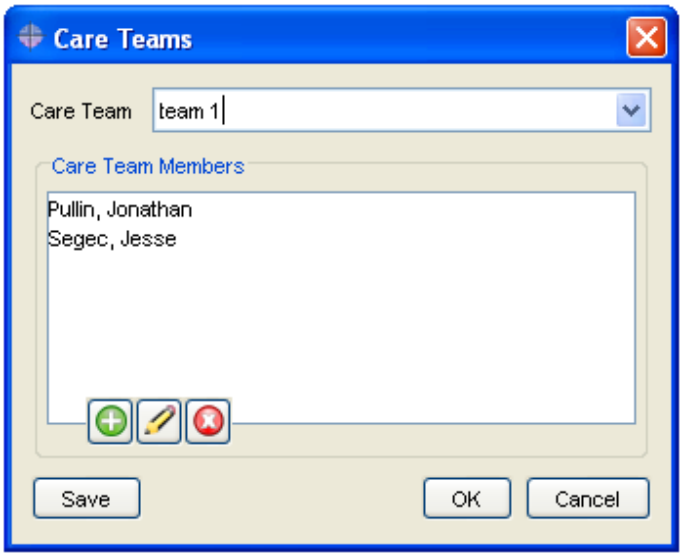
BACKUP MENU

CDS MENU

CONFIGURATION MENU

Care Teams

Care Teams are used in the **Providers** tab of the **Patient Demographics** section.



Adding a Care Team

To add a new care team

1. Select **New** from the **Care Team** dropdown menu.
2. Type in a **Care Team** name.
3. Click the **Add** button .
4. Select one or more providers (hold the **CTRL** button to select more than one).
5. Click **OK**.
6. Click **Save**.

Editing Care Team Members

To edit care team members

1. Select a **Care Team** from the dropdown menu.
2. Click on a provider to select them.
3. Click the **Edit** button .
4. Type in a **Note**.
5. Uncheck the **Active** button to show the provider as **Inactive**.

6. Click **OK**.

7. Click **Save**.

Removing Care Team Members

To remove a care team member

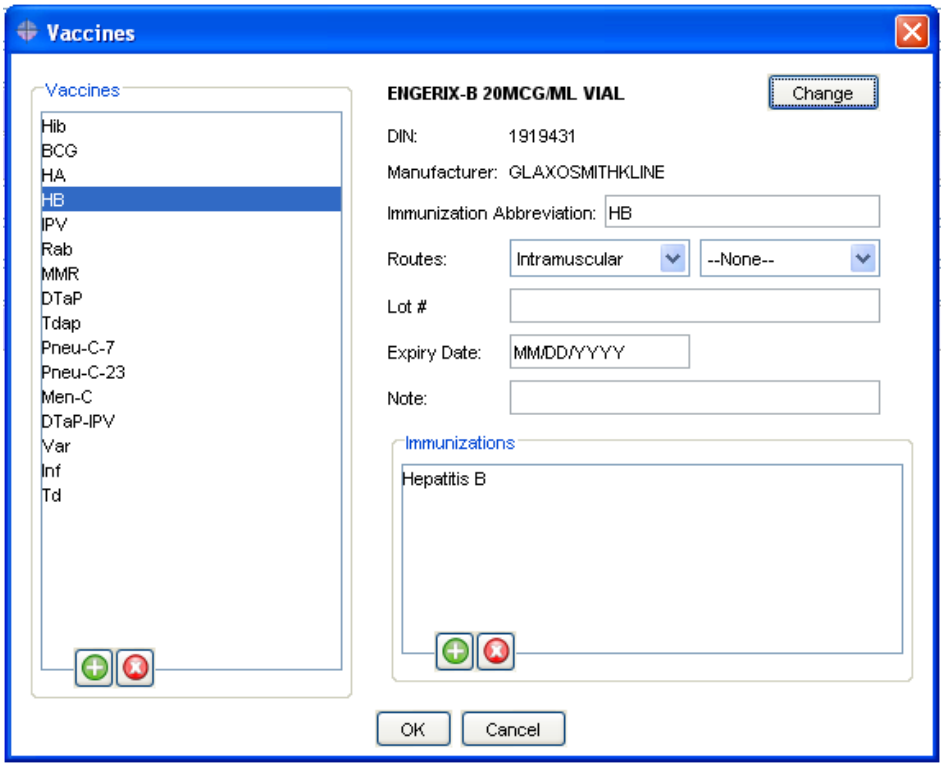
1. Select a **Care Team** from the dropdown menu.

2. Click on a provider to select them.

3. Click the **Remove** button .

Vaccines

The **Vaccines** dialog is used to match a **Vaccine** with a **Manufactured Lot**.



Matching a Vaccine with a Lot

To match a vaccine with a manufactured lot

1. Click on a vaccine to select it. If the required vaccine is not in the list, you can add it.

   - ***To add a vaccine***

     1. Click the **Add** button. This will open the **Manufactured Drug Search** dialog.

     2. Type in a drug and click the **Search** button .

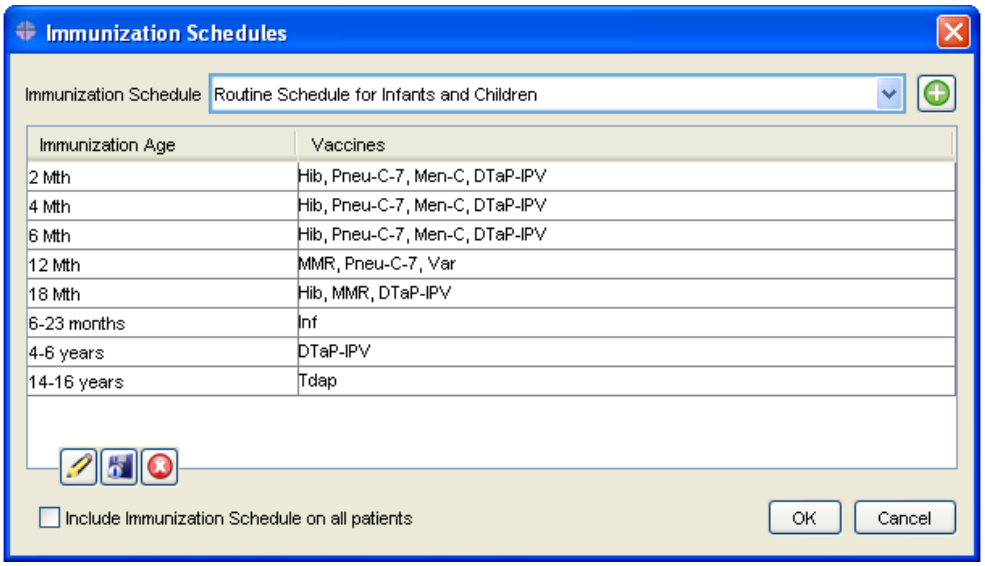
3. Click on a **Product Name** to select it.
4. Click **OK**.

2. Click the **Change** button and select a **Manufactured Drug**:
    1. Type in a drug and click the **Search** button .
    2. Click on a **Product Name** to select it.
    3. Click **OK**.
3. Set the **Immunization Abbreviation** if necessary. This is the name that will appear under **Vaccines**.
4. Select **Routes** from the dropdown lists.
5. Type in the **Lot #**.
6. Select an **Expiry Date** from the popup menu.
7. Type any additional information in the **Note** field.
8. Add any related **Immunizations** (Diseases) by clicking the **Add** button selecting a disease from the list in the Immunizations dialog.
    - ➢ You can add and manage Immunizations from this dialog.
9. Click **OK**.

Immunization Schedule

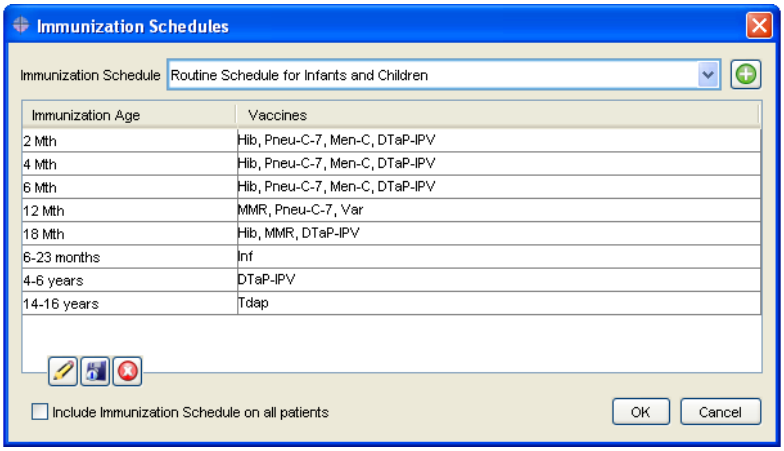
The Immunization Schedule is used to setup a series of immunizations at scheduled time intervals.

Creating a New Immunization Schedule



To create a new immunization schedule

1. Click the **Add** button beside **Immunization Schedule**.
2. Type in a **Name** for your schedule.
3. Click the **Edit** button.
4. Add **Immunizations** and their respective **Ages**:



   1. Select an **Immunization** from the dropdown list.
   2. Click the **Add** button.
   3. Hold **CTRL** and select a series of **Ages** from the list.
   4. Click **OK**.
   5. Repeat steps 1-4 until you have added all necessary Immunizations and Ages.

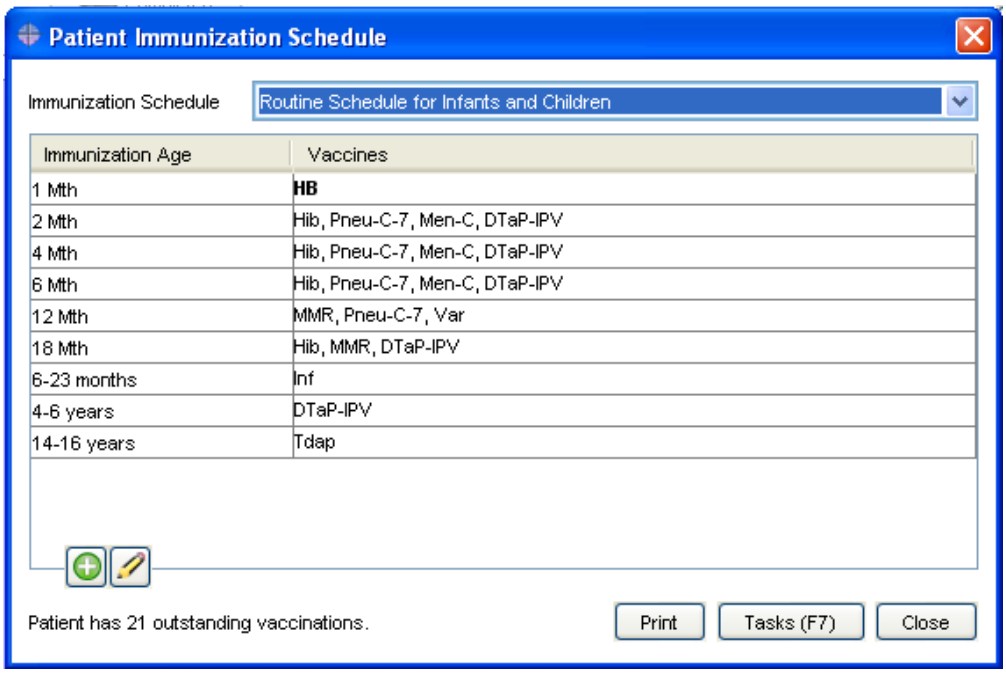
5. Click the **Save** button.

Patient Immunization Schedule

The **Patient Immunization Schedule** is used to keep a record of immunizations for a patient, according to an immunization schedule.

An immunization schedule must be selected for the patient to follow. Vaccines can then be administered according to the schedule. The number of outstanding vaccinations is shown in the lower left-hand corner.

A patient's immunization schedule will appear under Encounter Notes under the Immunization Schedule band.



Selecting a Schedule

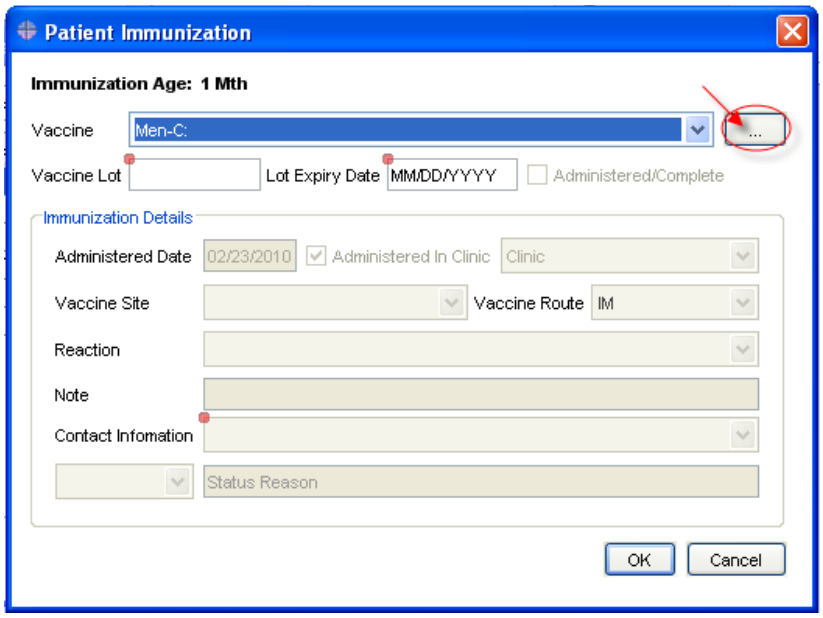
To select an immunization schedule

- Select an **Immunization Schedule** from the drop-down list.

Administering a Vaccine

To administer a vaccine

1. Click on the vaccine that is next on the patient's immunization schedule.
    - More than one vaccine may appear on an immunization age.
    - If you click on a vaccine that has an immunization age higher than the patient's age, you will get a warning message.
2. Click the **Edit** button.
3. Click **OK** when prompted.
4. Select the correct vaccine from the drop-down list.
5. Click the **Change Drug** button to select a manufactured drug.



1. Search on a drug name.
2. Select the desired drug and click **OK**.

6. Type in the **Vaccine Lot** number.
7. Choose an **Expiry Date**.
8. Click the checkbox beside **Administered/Complete**.
9. Choose an **Administered Date** (not required).
10. If the vaccine was not administered in the clinic, uncheck **Administered in Clinic** and select a location from the drop-down list (not required).
11. Select a **Vaccine Site** from the drop-down list (not required).
12. Select a **Vaccine Route** from the drop-down list (not required).
13. Select a **Reaction** if any (not required).
14. Type any additional information into the **Note** field (not required).
15. Select a **Contact Information** from the drop-down list (required).
16. Click **OK**.

Adding and Administering a Vaccine to a Schedule

To add a vaccine

1. Click the **Add** button.
2. Select a **Vaccine** from the list and click **OK**.

3. Click OK when prompted.

6. Click the **Change Drug** button to select a manufactured drug.

    1. Search on a drug name.

    2. Select the desired drug and click OK.

7. Type in the **Vaccine Lot** number.

8. Choose an **Expiry Date**.

9. Click the checkbox beside **Administered/Complete**.

10. Choose an **Administered Date** (not required).

11. If the vaccine was not administered in the clinic, uncheck **Administered in Clinic** and select a location from the drop-down list (not required).

12. Select a **Vaccine Site** from the drop-down list (not required).

13. Select a **Vaccine Route** from the drop-down list (not required).

14. Select a **Reaction** if any (not required).

15. Type any additional information into the **Note** field (not required).

16. Select a **Contact Information** from the drop-down list (required).

17. Click **OK**.

Condition Diagnosis Maps

This dialog is used to link a **Diagnostic Code** with a **Condition** in Accuro.

Adding a Diagnostic Code to a Condition

To add a diagnostic code to a condition

1. Select a condition from the drop-down list.

2. Click the **Add** button.

3. Search on either a **Keyword** or a **Code**.

4. Select one of the results.

5. Click **Select**.